Unica Collaborate V12.1.1
Field Marketer's Guide

Contents

Chapter 1. Unica Collaborate

Unica Collaborate provides marketing organizations with the ability to distribute the execution of centrally managed marketing campaigns throughout the enterprise.

It allows centralized marketers to maintain control over corporate standards and business rules, while it allows remote users to tailor or provide input to the campaign for greater local customization and relevance, ultimately increasing response rates and revenue.

Collaborate supports campaign customization by remote users; however, the remote users can change only those parameters that are specified by the campaign designer.

For example, a retail company might want to centrally control certain selection criteria, but allow individual store owners to control selections that are related to their stores or locations.

Collaborate use cases

Collaborate enables organizations to accomplish their goals by supporting multiple collaborate use cases.

Specifically, Collaborate enables you to:

- Centralize marketing efforts while it ensures that corporate business rules, logic, and best practices are enforced, allowing execution and controlled customization throughout the organization.
- Promote field compliance by having corporate marketers centralize campaign design with corporate business rules (such as opt-outs) and customer preferences.
- More efficiently design, conduct, manage, and measure both global and localized cross-channel marketing initiatives.
- Increase the number of users who are able to contribute to and run campaigns, providing more flexibility within an organization and enabling measurement and management of marketing efforts.

- Provide "self-serve" customer interaction management within an enterprise, for less technical-oriented marketers and individuals closest to the customer, without compromising corporate rules, goals, or objectives.
- Manage customer interactions in real-time through email and the web.
- Allow marketing decision-making and campaign management to be handled by field marketers, while corporate marketers manage corporate marketing communication and policies.

Corporate marketers

Corporate marketers develop templates for reusable campaign logic and lists of customer contacts.

Corporate marketers manage corporate campaigns and oversee marketing activities of field marketers. They also specialize in designing and generating campaigns from which the field marketer can choose.

Primary corporate marketer tasks

In Collaborate, corporate marketers perform the following tasks:

- Design campaign flowcharts.
- Create corporate campaigns.
- Manage campaign workflow.
- Create reports that are used to assess campaign success.
- Design templates for Corporate Campaigns, On-demand Campaigns, and Lists, for use by field marketers and other corporate marketers.

Corporate marketer tasks in Campaign

Corporate marketers also frequently use Campaign, through which they design and build flowcharts that are associated with Lists, On-demand Campaigns, and Corporate Campaigns.

Corporate marketer roles

Corporate marketers must be assigned the Corporate Marketer role in the Global security policy, or its equivalent, to perform their tasks.

To work in Campaign, corporate marketers must be assigned the following roles:

- Global Policy Execute
- Global Policy Design
- Global Partition Design or Execute

Field marketers

Field marketers create and run local or regional marketing activities for a territory or line of products.

Field marketers work directly with customers, understand their needs, and can make good decisions on how best to reach their customers with on-demand or corporate marketing campaigns.

Field marketers may be line-of-business users, partners, branch office managers, retail store managers, or members of local sales forces. Field marketers create on-demand (local) campaigns that they can run at any time to target a local customer base.

Field marketers tasks

In Collaborate, field marketers work with:

- Lists

  Field marketers typically create Lists in Collaborate and define criteria to select contacts for the Lists. These Lists can then be used by one or more On-demand Campaigns as needed.
- On-demand Campaigns

  Field marketers can create and run On-demand Campaigns to target their set of customers.

• Corporate Campaigns

Field marketers subscribe to the Corporate Campaigns they want to participate in. For those Corporate Campaigns, field marketers review and choose which of their customers are targeted by the Corporate Campaign.

Field marketer roles

Field marketers must be assigned the Field Marketer role in the Global security policy, or its equivalent, to perform their tasks.

Logging in to HCL Unica

This procedure assumes that you know the website address (or URL) to your server and you have an assigned user name and password. If you need help, contact your HCL Unica administrator.

1. Open a supported browser and enter the URL to the HCL Unica server.
   The prompts that display vary based on the security settings that are defined for your installation.

2. If prompted, accept the digital security certificate.

3. On the login page, enter your user name and password, then click **Sign In**.

   If you are prompted to accept the digital security certificate, click **Yes** to accept the certificate.

The dashboard or the default start page displays. The options that are available to you depend on the permissions that are assigned to you by your HCL Unica administrator.

📝 **Note:** For a list of supported browsers, see the Recommended Software Environments and Minimum System Requirements guide.

Collaborate documentation and help

Collaborate provides documentation and help for users, administrators, and developers.

The following table describes the various tasks of Collaborate. The **Documentation** column contains names of documents where you can find more information about the tasks.

Table 1. Get up and running

This two-columned table describes the Collaborate installation or upgrade tasks in one column, and the corresponding documents in the second column.

Task	Documentation
Find out about new features, known issues, and limitations	Collaborate Release Notes
Learn about the structure of the Collaborate system tables nh	Collaborate System Tables and Data Dictionary
Install or upgrade Collaborate	One of the following guides: • Collaborate Installation Guide • Collaborate Upgrade Guide
Implement the IBM® Cognos® reports provided by Unica Collaborate	Cognos Reports Installation and Configuration Guide
Implement Unica Insights reports provided by Unica Collaborate	Unica Insights Installation and Configuration Guide

The following tables describe administrative tasks in Collaborate. The **Documentation** column contains names of documents where you can find more information about the tasks.

Table 2. Configure and use Collaborate

This two-columned table describes the Collaborate administrative and user tasks in one column and the corresponding documents in the second column.

Task	Documentation
• Set up and configure the system for users • Adjust security settings • Map tables, define offer templates and custom attributes • Run utilities and perform maintenance	*Unica Collaborate Administrator's Guide*
• Create and deploy marketing campaigns • Analyze campaign results	Unica Collaborate Corporate Marketer's Guide Unica Collaborate Field Marketer's Guide
Use REST APIs	Unica Collaborate REST APIs

The following tables contain information about online help and obtaining PDFs for Collaborate. The **Instructions** column describes how to open online help and access documentation for Collaborate.

Table 3. Getting help

This two-columned table contains information about how to start online help and access PDF documentation for the Collaborate. Second column contains instructions for the tasks.

Task	Instructions
Open online help	1. Choose **Help > Help for this page** to open a context-sensitive help topic. 2. Click the **Show navigation** icon in the help window to display the full help. You must have web access to view context-sensitive online help. Contact HCL Support for more information about accessing and installing Unica Knowledge Center locally for offline documentation.

Task	Instructions
Obtain PDFs	Use either of the following methods: • Choose **Help > Product documentation** to access Collaborate PDFs. • Choose **Help > All HCL Unica suite documentation** to access all available documentation.
Unica Knowledge Center	To access the Unica Knowledge Center, choose **Help > Support for this product**.

Chapter 2. Customize Collaborate

You can customize the Collaborate interface to meet your needs. Customization settings are available in Collaborate when you click **Settings** or **Settings > Collaborate Settings**.

The following table describes what you can customize.

Table 4. Options for customizing Collaborate

Option	Description
Set current page as Home	Set the current page to display automatically as soon as you log in to Collaborate.
Basic Settings	Set the security policy to apply to new items by default.
Timezone	Choose your local timezone.
Projects Options	Define the project list and view to show by default for projects.
Tasks Options	Define the task list and view to show by default for tasks.
Collaborate Analytics Options	Set a default report to display when you go to the **Analytics > Collaborate Analytics** page, and set the Analytics home page as your login page.
Instances Options	Customize your default view of Lists, On-demand Campaigns, and Corporate Campaigns.
Calendar/ Timeline Settings	Select options to customize how you view the calendar and task milestones.

You (or another user with the appropriate permission) can set up dashboards to show the information that you view most often. Each dashboard can include one or more "portlets" that present:

- List management.
- Subscription management.

- Campaign management
- Calendar

Setting your basic settings

Use the basic settings option to choose the security policy that is used by default when you create items.

To set the security policy, complete the following steps.

1. Select **Settings > Collaborate Settings**.

   The **Administrative Settings** page opens.

2. Click **Basic Settings**.

   The **Basic Settings** page opens.

3. In the **Default Security Policy** field, select the security policy to use by default when you create items in Collaborate.

   You can leave **Global** selected, which is the default, to use the global security policy that is defined by your administrator. Otherwise, you can select a security policy that your administrator instructed you to select. As a best practice, do not change the security policy without the guidance of your administrator. For more information about security policies, contact your administrator or see the Collaborate Administrator's Guide.

4. Click **Save Changes** to save your changes.

Setting your instance options

You can use instance options to customize your default views of Lists, On-demand Campaigns, and Corporate Campaigns.

For example, you might want to specify that the On-demand Campaigns list that opens by default shows only On-demand Campaigns set to run in the current week.

1. Select **Settings > Collaborate settings**.

   The **Administrative Settings** page opens.

2. Click **Instances Options**.

   The **Instances Options** page opens.

3. In each of the List, On-demand Campaign, and Corporate Campaign sections, select the default view.

4. Click **Save Changes** to save your changes.

When you open the Lists, On-demand Campaigns, or Corporate Campaigns page, your default list is shown.

Setting your start page

The start page is the page that displays when you log in to HCL Unica. The default start page is the default dashboard, but you can easily specify a different start page.

If you do not want a dashboard page to display when you first log in to HCL Unica, you can select a page from one of the installed Unica products as your start page.

To set a page you are viewing as your start page, select **Settings > Set current page as home**. Pages available for selection as a start page are determined by each HCL Unica product and by your permissions in HCL Unica.

On any page you are viewing, if the **Set current page as home** option is enabled, you can set the page as your start page.

Calendar

Historically, organizations produced paper-based calendars and updated them with the latest information. The calendar feature provides marketing groups with electronic means to view and update calendar data.

Field marketers and corporate marketers can use the Collaborate calendar to view the time horizon for marketing campaigns.

Marketing organizations typically organize their work with calendars. For example, seasonal events drive marketing programs, and other external dates, such as store openings, and seasonal product announcements.

You can use the calendar as an aid for planning marketing campaigns.

- You can view and update the timelines for Lists, On-demand Campaigns, or Corporate Campaigns.
- You can get an up-to-date view of planned or run marketing efforts over time.

You can customize the appearance of the calendar in the following ways.

- You can set a default view of the calendar: Click **Settings > Collaborate Settings > Calendar/Timeline Settings**.
- You can choose the look of the calendar in the Set View Options dialog box.
- You can filter the items that are displayed on the calendar with Advanced Search.

Calendar features

The calendar in Collaborate displays Lists, On-demand Campaigns, or Corporate Campaigns. You can also edit the views.

The Collaborate calendar has the following features:

- The calendar includes start and end dates for the displayed items.

- You can display Corporate Campaigns and On-demand Campaigns on the same calendar in different colors for easy differentiation.
- You can open a Corporate Campaign, List, or On-demand Campaign directly from the calendar.

Default and per session calendar views

You can use one of two types of settings when you view the calendar:

- The default calendar settings, which are in effect every time you log in.
- The per session calendar settings. The per session calendar is the calendar that results from making temporary changes to the calendar view, without changing the default settings.

Objects displayed in a calendar

You can display any of the following objects in a calendar:

- Corporate Campaigns
- On-demand Campaigns
- Lists
- Corporate Campaigns and On-demand Campaigns

Calendar item dates

Each List, On-demand Campaign, or Corporate Campaign that is displayed in a calendar has a start and end date. These are the target start and end dates you set when you create the object.

Display options for the calendar

You can modify the calendar display in the following ways:

- You can modify the default calendar settings.
- You can set the calendar view for the current session.
- You can toggle between calendar views:
  - Timeline view

- ◦ Calendar grid view
- ◦ Text view
- You can use the advanced search feature to filter the Lists, On-demand Campaigns, or Corporate Campaigns that are displayed in the calendar.

Timeline view

This view displays a time-based view of the Lists, On-demand Campaigns, or Corporate Campaigns you select to display. You can select the time range for the calendar items you select to display in a timeline view.

In a timeline view, each calendar item is displayed as a horizontal bar across its date range. If you enable color coding, each calendar item is colored according to attributes you select.

You can select the date range for the timeline from the following options:

- **Week** displays one week. Each day is listed as a column. The starting day is either Sunday or Monday, depending on the default calendar settings.
- **Month** displays a single calendar month. Each day is listed as a column, and days are grouped into weeks.
- **Quarter** displays three calendar months. Each week is listed as a column, and weeks are grouped into months.
- **Fiscal Year** displays a fiscal year. Your administrator can configure the starting month for a fiscal year. Each month is listed as a column, and the months are grouped into quarters.
- **Calendar Year** displays a calendar year that starts in January and ends in December. Each month is listed as a column, and the months are grouped into quarters.

📝 **Note:** Any day that is specified as non-work time is disabled in a timeline view.

Month-based text or calendar grid view

A month-based calendar view displays a calendar for a selected month.

In addition to a month-based timeline view, you can select from the following month-based calendar views:

- 1-Month Text: Each day contains a text listing of selected, Lists, On-demand Campaigns, or Corporate Campaigns.
- 1-Month Calendar Grid: Each calendar item is displayed as a horizontal bar that begins on the item start date and ends on the item end date. If you enable color coding, each calendar item is colored according to attributes you select.

📝 **Note:** Any day that is specified as non-work time is indicated by a gray X in the background in a calendar grid view.

Color-coded by attribute view

You can color-code the calendar display for Lists, On-demand Campaigns, or Corporate Campaigns by selected attributes. You can apply color-coding to a calendar grid view or to a timeline view.

You can filter the calendar display for Lists, On-demand Campaigns, or Corporate Campaigns according to the values of a selected attribute, such as the following.

- Execution status
- Schedule status
- Template type

The calendar displays a legend in the lower-right corner of the screen.

For example, consider the following On-demand Campaign attribute and its possible values:

- Attribute name: Campaign Execution Status
- Valid attribute values: Active, Complete, Under development

If you group and display On-demand Campaigns by Campaign Execution Status, the resulting calendar is displayed with four colors in the legend. There is one color for each valid attribute value, and one for N/A.

📝 **Note:** The color that is assigned to N/A is displayed in the calendar when calendar items are not assigned a value for the selected attribute.

Horizontal bars used in calendars

The timeline view and calendar grid view display calendar items as horizontal bars.

Note the following information about bars:

- The bars represent the date range for objects that are displayed on the calendar.
- The bar color depends on values of an attribute you optionally select for color coding.
- The shape of the bars determines the following about item start and end dates:
  - Rounded left end: The start date is the date indicated by the left end of the bar.
  - Rounded right end: The end date is the date indicated by the right end of the bar.
  - Flat left end: The start date is before the visible date range.
  - Flat right end: The end date is beyond the visible date range.

Accessing the calendar

You can access the calendar for Lists, On-demand Campaigns, or Corporate Campaigns by clicking the **Set View Options** icon.

1. From the **Collaborate** menu, select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns**.

2. From the **View** menu, select **Set View Options**.

3. Set the view options.
   You can display the calendar as a Timeline, a Text Calendar, or a Graphical Calendar.

4. Click **Apply**.

Navigating the calendar

All calendar/timeline views contain the following icons:

Icon	Description
👁	Opens the Set View Options dialog box. Use this link to change the way that the calendar is displayed.
▽	Opens the Advanced Search dialog box.
◁	Changes the date range that is displayed, moving back one unit in time. For example, if your current calendar view is a monthly timeline of September 2009, clicking ◁ displays August 2009.
Current date range	Opens a drop-down list of available date ranges. Use this link to quickly change to any other date range. For example, if you are viewing a monthly calendar for July 2009, you can change the view to January 2010 by clicking this link and then choosing January 2010 from the drop-down list.
▷	Changes the date range that is displayed, moving forward one unit in time. For example, if your current calendar view is a weekly timeline from 7/20/2009 through 7/26/2009, clicking ▷ displays 7/27/2009 through 8/2/2009.

Setting per-session calendar views

You can change the views of the calendar from default settings by clicking View from the **Calendar** page or a listing of Lists, On-demand Campaigns, or Corporate Campaigns.

1. Access the calendar.

2. Click **View**.

   The Set View options dialog box opens.

3. Select options to change the view.

4. Click **Apply**.

Accessing calendar objects by date

You can filter the calendar to display all of the Collaborate objects for a selected date.

You can view all the objects at a more granular level. For example, if the calendar is displaying Corporate Campaigns for June 2009, you can click **7** to open a list page that contains all Corporate Campaigns whose date ranges contain June 7th, 2009.

Click the date in an open calendar that displays Lists, On-demand Campaigns, or Corporate Campaigns.

Accessing an object from the calendar

You can view the List, On-demand Campaign, or Corporate Campaign from its calendar.

Click the List, On-demand Campaign, or Corporate Campaign on the calendar.

The List, On-demand Campaign, or Corporate Campaign opens.

Exporting the calendar

You can save a snapshot of the current calendar in HTML format.

1. With the calendar open, click the menu next to the print icon ( ) and select **Export**.

2. Choose one of the following options:
    - Click **Open** to open the compressed file of the calendar.
    - Click **Save** and choose a location to save the calendar to disk.
    - Click **Cancel** to return to the Calendar screen without publishing.

The system publishes the calendar into a compressed file archive.

Publishing the calendar

You can save a snapshot of the calendar at a certain moment in time. When you publish the calendar, you chose which information you want to display and how you want to display it.

To get a snapshot of the current calendar, save it in HTML format (into a ZIP compressed archive file).

1. Choose the calendar view to publish.

   Select the objects, time range, and appearance for the calendar view. You can make selections in either of the following ways:

   • From the **Local Marketing** menu, select **Calendar**. Then, select items to view.
   • At a list page for Lists, On-demand Campaigns, or Corporate Campaigns, click the

     View icon (👁) and choose a calendar view.

   📝 **Note:** If the current calendar view includes projects, Project data is exported as well. The exact data that is exported depends on how the project template was set up; Summary and custom tabs might be exported for some or all projects.

2. Click the **Print** icon (🖶) and select **Export**.

3. Take one of the following actions.
   • Click **Open** to open the compressed file of the calendar.
   • Click **Save** and choose a location to save the calendar to disk.
   • Click **Cancel** to return to the **Calendar** page without publishing.

The system publishes the calendar into a compressed file archive. You can use any application for working with compressed files to access the calendar HTML pages. You can go to the next and previous pages of the calendar view in your web browser. If you exported any project data, you can also go to that data from the calendar HTML pages.

Viewing the timeline

If you choose a timeline view, you can choose from several date ranges. The screen can display data for a single week all the way up to data for an entire year.

Timeline view of the calendar

If you choose a timeline view, you can choose from several date ranges. The screen can display data for a single week, up to data for an entire year.

The timeline view displays a grid-like view of the objectsthat you selected and filtered (for example, Active Lists). The objects are organized by a unit of time, depending on which timeline view you selected.

Each object is displayed in a horizontal bar across its date range. The name of the object displays on the bar.

📒 **Note:** If you select **Enable Color Coding** from the calendar view options screen, the bar for each object is displayed in a color that is based on an attribute you chose.

Choose a date-range for the timeline.

- Week: displays one week, with each day listed as a column. The starting day is either Sunday or Monday depending on the option that is selected in the **Calendar/Timeline Settings** page.
- Month: displays a single calendar month. Each day is listed as a column, and days are grouped into weeks.
- Quarter: displays three calendar months. Each week is listed as a column, and those weeks are grouped into months.
- Fiscal Year: displays a fiscal year. The starting month depends on a configuration setting, `firstMonthInFiscalYear`. Each month is listed as a column, and the months are grouped into quarters.
- Calendar Year: displays a calendar year, which starts in January and ends in December. Each month is listed as a column, and the months are grouped into quarters.

📝 **Note:** Any day that is specified as non-work time has its column that is disabled. Additionally, the name of the non-work time (for example, "Labor Day") displays when you point to the date. This feature is not available when the time scale is Quarter, Fiscal Year, or Calendar Year.

Navigating the timeline view

You can navigate the timeline by doing any of the following:

- Click the expand icon (+) next to an object to display objects that are contained in the hierarchy.
- Click the expand icon (+) next to an object to display tasks within the workflow for that object.
- Click the object name to drill down to a timeline that contains the objects contained in its hierarchy.

  📝 **Note:** Clicking a task opens the **Workflow** page of the project with which the task is associated.

- Click the zoom in (🔍) and zoom out (🔍) icons. These icons are displayed above the timeline. Zooming changes the date range of the timeline. For example, zooming in from a monthly timeline takes you to a weekly timeline. The top level is (fiscal) yearly, and the lowest level is weekly.

Text or graphical calendar views

The calendar views display data for a selected month. The view contains a cell for each day of the selected month. The cell for a day contains either a list of items active on the day (text) or a portion of a horizontal bar for each active item (graphical).

The page displays a grid that contains a column for each day of the week: either five columns that represent the weekdays, or seven, if you choose to display weekend days. You set this option on the **Calendar/Timeline Settings** page. The page contains either five or six rows, each representing a week.

Monthly calendar

The monthly calendar view displays a calendar of the selected month. It lists the objects you selected and filtered on (for example, Active Lists).

Choose either of these monthly calendar views.

- **1-Month Text**: Each day contains a list of objects. An object is displayed for all days in its date range.
- **1-Month Graphical**: Each object is displayed in a horizontal bar that begins on its start date and ends on it end date. If you select **Enable Color Coding** from the calendar view options page, the bar for each object appears in a different color.

📒 **Note:** Any day that is specified as non-work time is indicated by a gray X in the background. Additionally, the name of the non-work time (for example, "Labor Day") displays when you point to the date.

Navigating the text/graphical calendar

Navigate the calendar by performing any of the following actions:

- Click the object to display its summary page. For example, clicking a project opens the project's List opens the List's Summary page.
- Click the date to display a list page that contains objects that fall on that date.

Calendar color coding

You can display objects in a color-coded manner on either the graphical calendar or in the timeline views.

First, select the **Enable Color Coding** check box in either the **Calendar/Timeline Settings** page or the **Set View Options** dialog box. After you check the box, the **Based on values for** menu opens. This list contains attributes for your Lists, On-demand Campaigns, and Corporate Campaigns(depending on which objects you are currently displaying in the calendar).

From this list, you can choose any attribute that is an enumerated type. For example, consider the following attribute:

- Name: Product Family
- Valid values: CDs, Credit Card, Home Mortgage

If you choose to group objects by this attribute, your calendar contains four colors: one for each valid value, CDs, Credit Card, and Home Mortgage, and **N/A**. **N/A** corresponds to any objects that do not contain a value for the Product Family attribute.

The calendar also displays a legend in the lower-right corner of the screen. The legend lists all valid values (CDs, Credit Card, and Home Mortgage, and **N/A**) along with the color corresponding to that value.

📝 **Note:** You can also color code by the template on which the project is based.

Horizontal bars on the calendar

The timeline view and graphical calendar view display horizontal bars. The bars help illustrate the duration and dates of calendar objects.

Note the following information.

- The bars represent the date range for objects that are displayed on the calendar.
- The name of the object displays on the bar.
- The bars can be colored based on an attribute you select.
- The shapes of the bars indicate the following conditions of the object.
    - Rounded-end "start": indicates that the object starts on the date where the bar has a rounded end.
    - Rounded-end "end": indicates that the object ends on the date where the bar has a rounded end.
    - Flat-end "start": indicates that the object starts before the visible date range.
    - Flat-end "end": indicates that the object ends after the visible date range.

Color-coding calendar items

You can use color-coding to display objects in a calendar according to a selected attribute.

You can display different colors of Corporate Campaigns, according to whether the Corporate Campaign is active or not.

📝 **Note:** You can also set color-coding for the default calendar settings.

1. Open one of the following:
     - Calendar
     - Lists
     - Corporate Campaigns
     - On-demand Campaigns

2. Click **View**.

   The Set View Options dialog box opens.

3. Check **Enable Color Coding**.

4. Choose a calendar item and corresponding attribute on which to base color-coding from the lists that are displayed.

5. Click **Apply**.

Zooming in or out of a timeline view

When you select a timeline view, you use the zoom feature to expand or collapse the date range for the view.

The top level for zooming out displays a year-based date range.

The lowest level for zooming in displays a week-based date range.

For example, zooming in from a monthly timeline takes you to a weekly timeline.

Click the zoom in icon (🔍⁺) or zoom out icon (🔍⁻) to change the view.

Viewing the server clock and time zone

You can view the server live clock and time zone information on tabs and pages of Lists, On-demand Campaigns, and Corporate Campaigns.

You can have your administrator set the **showServerLiveClock** parameter to view the server time zone and live clock that shows the server time on the Summary and Workflow tabs, the Scheduler pop-up window, and post-task pop-up pages of Lists, On-demand Campaigns, and Corporate Campaigns.

Chapter 3. Lists

A List is a group of contacts, and a field marketer can define criteria to include or exclude contacts from a List.

The field marketer can create a List that selects all contacts in the customer database within a specified income range, for example.

Why field marketers create and use Lists

The field marketer can associate Lists with an On-demand Campaign, to specify the contacts to be targeted by that campaign. For example, the field marketer can configure an On-demand Campaign to include contacts from one List and exclude contacts from another List.

Field marketers can reuse Lists, so that multiple On-demand Campaigns target the same or a similar group of contacts. Therefore, by creating and reusing Lists, you can streamline your contact selection for On-demand Campaigns.

Field marketers can also use Lists to analyze target customers outside of On-demand Campaigns. For example, a field marketer can generate a List, and then download it as a Microsoft™ Excel file for further analysis.

Examples

Field marketers who are responsible for a line of products that are purchased by customers with income greater than $50,000 can create a List that selects only targets with income greater than $50,000. A field marketer can then use this List as the basis for the target population for all subsequent On-demand Campaigns pertaining to this product line.

As another example, if most On-demand Campaigns target a population over 18, field marketers can create a List that targets the members of the corporate database whose age is over 18, and use this List to create the base target population for all On-demand Campaigns.

Simple Lists

A Simple List provides basic list functions to select specific recipients for targeting during an On-demand Campaign.

Advanced Lists

An Advanced List provides all of the functions available in a simple list. In addition, an Advanced List provides a Workflow tab to allow you to configure, schedule, and monitor tasks that are associated with the List.

An Advanced List must be based on an Advanced List template. You cannot change a List from Simple to Advanced after creation.

You can also configure an Advanced List to recur. A recurring List is an Advanced List that is configured to automatically generate the List members at specified intervals. The Recurrence tab allows you to configure recurrence properties.

Combining Lists for an On-demand Campaign

As a field marketer, you can create a set of Lists, each of which filters the corporate database concerning one demographic characteristic. You can then combine one or more Lists to create a base target recipient population for an On-demand Campaign.

Examples of combining Lists

Using selection criteria, you might create a List for each of five income brackets in the customer database. You then select the Lists for the top two income brackets for an On-demand Campaign marketing your high-end product.

In a more complex scenario, you might target customers for a luxury product campaign by combining Lists that use income, postal code, and credit rating as selection criteria.

Refining the List for an On-demand Campaign

You select the base target population by including or excluding predefined Lists in an On-demand Campaign. You can further refine the campaign target population for a specific On-demand Campaign

You can filter base target population for selected demographic characteristics or other attributes.

For example, if you are a field marketer responsible for marketing basketballs, you can refine a List to include only families that include members of extracurricular sports teams.

Lists and target start and end dates

You can create target start and end dates for Lists, including target start and end dates for each task in the workflow of an advanced list.

You can configure these workflow task target dates to trigger scheduled events. For example, you can configure the workflow to generate a target list according to a schedule.

Selection criteria

Selection criteria are the variables and values you use to filter the corporate database to select targets.

Selection criteria might include the variable `Income Range`, for example. You then define the ranges to match for inclusion in the target List. You can also specify that the contacts must have an income between $50,000 and $100,000. Contacts with an income outside of this range are then not selected.

Using multiple variables for selection criteria

Typically, you define selection criteria by selecting values for multiple variables.

If the Campaign flowchart that queries the corporate database uses the Collaborate variables as intended, the variables are combined in the query by using a logical AND.

For example, if you set the following selection criteria:

Variables	Value to Select
Gender	Male only
Marital Status	Married only

Then the contacts would include married males.

The contacts would *not* include:

- Single or divorced males
- Married females

Setting up available selection criteria

The Collaborate administrator or corporate marketer sets up the available selection criteria that marketers can use to select contacts.

Creating a list

You should create a List that filters the corporate target customers that are based on attribute values that are appropriate for your On-demand Campaign.

Before you create an On-demand Campaign that includes or excludes the List, make sure that it has the following conditions:

- You did not create the List.
- You expect that this List has potential to be reused for multiple On-demand campaigns or by several field marketers.

1. From the Home or List page, click **Add a List**.

   A tree view listing of templates is displayed.

2. Select a template from the tree view.

   A list of the customer attributes associated with a selected template is displayed, along with other related information. This information might help you to decide which template to select if there are more than one listed.

3. Click **Continue**.

   The **Summary** page of the List wizard is displayed. The content of List wizard differs depending on the template you select.

4. Complete the **Summary** page as needed.

   Ensure that the Target Start date is not a previous date, and that it occurs before the

   Target End date. To view a calendar and select a day, you can click next to the date fields.

5. Click **Next>>**.

   The next page in the List wizard opens.

6. Continue filling out the List wizard as needed, clicking **Next>>** to more through the pages.

7. Click **Finish** when you enter all required data.

Reviewing List contacts

After a List runs and generated the list of contacts, you can review, and if necessary modify, the list of contacts.

Contact status in the List

Each contact in a List has one of the following statuses:

- Waiting. You or another Field Marketer must review these contacts and decide whether to include them in the List.

- Accepted. These contacts are included in the List.
- Newly Added by Field Marketers. These contacts were not part of the original generated List, but were added by you or another Field Marketer, and are now included in the List.

  You or another field marketer can add contacts to the List permanently, or for this use of the List only.
- Declined. These contacts were removed from the List.

Changing the contact in the List

While you review the List contacts, you can:

- Decline contacts currently included in the List.
- Accept contacts that are currently declined.
- Put accepted or declined contacts in Waiting state to be reviewed by another Field Marketer.
- Add contacts not in the original List.
- Decline contacts that are added by another Field Marketer.

Accessing contacts to review

You access the List contacts through that List Summary page, in the List Review section. Counts of the contacts in each status are listed. For example, the following section of the screen shows:

- Three contacts "Waiting" to be reviewed
- 24 contacts "Accepted" in the List
- 10 contacts "Newly Added by Field Marketers" to the List
- Three contacts "Declined" to be in the List

Analyzing List contacts

You can analyze List contacts in multiple ways:

- Explore contacts in the **Contact Review** page. You can sort by column to see groups of contacts.

  Export contacts to Microsoft Excel to use Excel's features to analyze contacts, or to upload to another analysis system.
- Develop a custom Cognos report for contacts with the Platform reporting package.

Opening the Contacts to Review page

You can open the **Contacts to Review** page through the List Review table.

1. Open the List.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

   The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

Changing the status of a contact

You can change the status of a contact when another field marketer is not viewing the contacts, or until the List review target end date passed.

If another user is viewing the contacts, or if the review target date passed, you cannot change a contact's status, and the status radio buttons are disabled.

1. Open the List.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. To change the status of individual contacts, click the radio button for a different column in that contact's row.
   For example, if the **Accept** radio button is selected for a contact, you can change the contact's status to Decline or Review by selecting the respective radio buttons.

4. To change the status of all listed contacts, click one of the buttons at the bottom of the page.
   For example, if you opened the list of Accepted contacts, to change them all to Declined, click **Decline All Records**.

   ⚠ **Important:** When you click one of these buttons, the screen refreshes immediately, and no contacts are listed, because no contacts now meet the criteria you selected when you opened the page. For example, if you chose to decline all accepted contacts, there are no more accepted contacts in the List, so none are displayed in the current window.

   The buttons displayed depend on the status of the contacts you opened.

   The changes that you make to all contacts are saved immediately, you cannot cancel the change.

5. To save you changes and continue working, click **Save Selections**.

6. To close the window, click **Close**.

   A message warns you that if you continue, any changes since the last time you clicked **Save Selections** are lost.

7. To save any other changes, click **Cancel**, then click **Save Selections**, then click **Close** again.

8. To close without saving additional changes, click **OK**.

The status of contacts in the list is updated.

Revising the target List selection criteria

You can revise the target List selection criteria if modifications are necessary to meet your campaign requirements.

Before you perform this task, you must review the target List for the On-demand Campaign.

Your review involves adjusting the selection criteria until the List contains the number of targets your campaign requires. In this case, it is not necessary to review the actual customers in the List.

📝 **Note:** The criteria available to select, for example, certain income ranges, are set up by your administrator.

1. Open the List or On-demand Campaign.

2. Open the tab with the selection criteria.

   The name of the tab is set by the template designer.

   The page opens, displaying the selection criteria that are used to select the contacts.

3. Click **Edit**.

   The selection criteria becomes editable.

4. In each field, select values as required.

   To select one or more values in a multi-select field, hold down the **Ctrl** key and click each value to select.

   To select a range of values in a field, select the first value, hold down the **Shift** key, and select the last value in the range.

5. If you are editing selection criteria for a List, and it is made available by the template designer, enter or, edit the value in the **Cell Size Limit** field.

   This value sets the maximum size of the List.

📝 **Note:** If your list size is over limit, you are alerted with a message that says, "Only lists with [the limit set in `config.xml` file] or less contacts can be viewed using this feature."

6. Click **Save Changes** to save the selection criteria you chose.

These criteria are used to select contacts the next time that the List is generated or the On-demand Campaign is run.

After you complete this task, you can customize the campaign offer.

Adding contacts to a List

You can add contacts to a List by clicking the **Add Records** icon.

1. Open the List.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

   The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Click **Add Records**.

   The **Add Records** window opens.

4. In the Find Records Matching pane, enter search criteria in the different fields to specify the records you want to find.

5. Click **Search**.

   Records matching your search criteria are displayed in the right pane.

6. To add a single contact and close the screen, click the value in the left-most column for that contact (the unique identifier).

The contact is added to the list, and the window closes.

7. To add multiple contacts, check the boxes in those contacts' rows, then click **Accept Selected**.

   The list of contacts is filtered to show only those you selected.

8. Click **Accept**.

   The contacts are added to the list, and the window closes.

When you add contacts, they are added with the status **Newly Added by Field Marketer(s)**. Therefore, if you are viewing the contacts with a different status, you do not see the newly added contacts in the list. To view those contacts, you must return to the List Summary, and click the number next to **Newly Added by Field Marketer(s)**.

Exporting contacts to Microsoft™ Excel

If you have the appropriate permissions, you can save the contacts in the List to a Microsoft Excel file for further analysis.

1. Open the List.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

   The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Click **Export**.

   You are prompted to open or save the Excel file.

Sorting contacts

You can sort contacts by any column to better find and analyze those in the list.

1. Open the List.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

   The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Click the column header.

   The first time that you click the column header, the table is sorted by that column in descending order. Click the column header again to reverse the sort order.

Printing contacts

You can print contacts from the **Contacts to Review** page.

1. Open the List.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

   The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Click **Print**.

   The table contacts open in a new window that is formatted for printing.

4. Right-click and select **Print**.

   The Print dialog box opens.

5. Follow the steps for printing on your network and printer.

Customer detail links

A customer detail link in a List is a link to another application that displays more information about the customer.

If your administrator configured customer detail links, when you review a List, you can click a link, and information from a customer database is displayed in a new browser window.

Your administrator configures customer detail link when configuring the list manager.

Opening customer details from the Contact Review page

The List Review table is where you can open customer details from the **Contacts to Review** page.

1. Open the List.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

   The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted in the List are included in the review page.

3. Scroll to the right of the window, if necessary, and click the icon or hypertext link in the last column for the customer for whom you want details.

   The icon or hypertext link you see is determined by your administrator.

The customer details open in a new window.

Chapter 4. On-demand Campaigns

An On-demand Campaign is a marketing campaign that field marketers create and run on an as-needed basis.

Typically, the corporate marketer provides the field marketer with a campaign template, allowing the field marketer to create new On-demand Campaigns based on that template and to modify those campaigns for their targets.

Field marketers can use On-demand Campaigns to deliver a marketing message to a set of their customers while they exercise some control over the offer, timing, and fulfillment methods used to deliver the marketing message. The amount of control field marketers have over the On-demand Campaigns they manage is determined by corporate marketing.

Field marketers' tasks for On-demand Campaigns

Using On-demand Campaigns, field marketers can:

- Specify On-demand Campaign target selection by using characteristics, such as demographic data, contract data, and contact information.
- Generate the On-demand Campaign target list, or schedule the list generation for a future date.
- Run or schedule the On-demand Campaign.
- If your organization set up reports for Collaborate, generate reports on the performance and status of the On-demand Campaign.

On-demand Campaign components

On-demand Campaigns include components and features to help field marketers.

The components and features are:

- The use of pre-defined Lists for specifying the base population to receive an on-demand marketing campaign
- The target list selection criteria for filtering the corporate database

- The campaign schedule that includes target start and end dates
- The campaign status
- The campaign run history
- Marketing messages in the form of attachments

Managing an On-demand Campaign

You need to define the target list for your On-demand Campaign. You can optionally modify the workflow inherited from the On-demand Campaign template.

The following list describes the tasks you, as a field marketer, take to create and execute an On-demand Campaign:

1. Create the On-demand Campaign.

   This task includes defining the target list for the On-demand Campaign. You can do one of the following:
   - Specify selection criteria to use to generate the List as part of the On-demand Campaign
   - Use one or more existing Lists to define the targets of the On-demand Campaign. This involves:
     - Selecting existing Lists with target customers to *include* in the On-demand Campaign.
     - Selecting existing Lists with target customers to *exclude* in the On-demand Campaign.
     - Selecting specific attributes to refine the target list.

2. Optionally, modify the workflow that is inherited from the On-demand Campaign template.

3. Generate the target list.

4. Review the target list results, and optionally add or remove customers from this list.

5. Optionally, revise the target list selection criteria, if modifications are necessary to meet your campaign requirements.

6. Customize the offer. Add attachments or personalization.

For example, you can add details that concern the offer, such as, "you are getting a 10% discount."

7. Run the On-demand Campaign.

   You can optionally schedule the On-demand Campaign to run at a future date.

8. Fulfill your campaign.

If your organization set up reporting for On-demand Campaigns, and after your corporate office enters campaign results data in the database, you can analyze the On-demand Campaign results.

Creating an On-demand Campaign

You can create an On-demand Campaign by clicking **Add an On-demand Campaign** from the home page. After you create an On-demand Campaign, you need to generate the target list.

1. From the home page, click **Add an On-demand Campaign**.

   A tree view listing of templates is displayed.

2. Select a template from the tree view.

   The list of templates available to you is controlled by your security permissions.

   A list of the attributes that are associated with the selected template is displayed, along with other related information. This information might help you to decide which template to select if there are more than one listed.

3. Click **Continue**.

   The first page of the On-demand Campaign wizard is displayed. The content of wizard differs depending on the template you select.

4. Perform the following tasks as you go through the wizard to specify the target list:

   a. Select at least one Collaborate List to include or exclude.

> 📝 **Note:** This step might differ according to what the corporate marketing team designed.

b. Select values for attributes that are presented to you to refine the target list for the campaign, or to designate information about the offer or campaign fulfillment.

5. Complete the attributes for fulfillment specification.

Next you must generate the target list.

Generating a target List for an On-demand Campaign

You generate a target List for an On-demand Campaign to analyze the target customers of a campaign. You can then modify the target List before you run or schedule the On-demand Campaign.

Before you perform this task, you must create the On-demand Campaign.

1. Select a Collaborate On-demand Campaign.

2. Generate the target List in one of three ways:
   - From the List Execution Status section of the Summary tab, click **Generate List**.
   - From the List Execution Status section of the Summary tab, click **Schedule Run**. Then, select the run schedule and click **Run with these Settings**.
   - From a Flowchart Run system task, which runs a flowchart in Campaign that selects the target customers.

After you generated the target List, you then review the List members.

Reviewing a target List

You review the target List to determine the appropriateness of the selected customers. During this task, you can add or remove customers from the target List as needed.

Before you perform this task, you must generate the target List for the On-demand Campaign.

1. Open the **Summary** page for the On-demand Campaign.

2. Open the **Contacts to Review** page by clicking a number in the Counts column of the List Review table.

   The **Contacts to Review** page opens, listing the contacts of the type you selected. For example, if you clicked the number before **Accepted**, all contacts currently accepted for the On-demand Campaign are included in the review page.

3. To change the status of individual contacts, click the radio button for a different column in that contact's row.

   For example, if the **Accept** radio button is selected for a contact, you can change the contact's status to Decline or Review by selecting the respective radio buttons.

4. To change the status of all listed contacts, click one of the buttons at the bottom of the page.

   For example, if you opened the list of Accepted contacts, to change them all to Declined, click **Decline All Records**.

   The buttons that are displayed depend on the status of the contacts you opened.

   ⚠ **Important:** When you click one of these buttons, the screen refreshes immediately, and no contacts are listed, because no contacts now meet the criteria that you selected when you opened the page. For example, if you chose to decline all accepted contacts, there are no more accepted contacts in the List, so none are displayed in the current window.

   The changes that you make to all contacts are saved immediately, you cannot cancel the change.

5. To save you changes and continue working, click **Save Selections**.

6. To close the window, click **Close**.

A message warns you that if you continue, any changes since the last time you clicked **Save Selections** are lost.

7. To save any other changes, click **Cancel**, then click **Save Selections**, then click **Close** again.

8. To close without saving additional changes, click **OK**.

The target List now contains the customers that you added, and does not contain the customers you removed.

After you reviewed the target List, you can revise the List selection criteria if necessary.

Revising the target List selection criteria

You can revise the target List selection criteria if modifications are necessary to meet your campaign requirements.

Before you perform this task, you must review the target List for the On-demand Campaign.

Your review involves adjusting the selection criteria until the List contains the number of targets your campaign requires. In this case, it is not necessary to review the actual customers in the List.

📝 **Note:** The criteria available to select, for example, certain income ranges, are set up by your administrator.

1. Open the List or On-demand Campaign.

2. Open the tab with the selection criteria.

   The name of the tab is set by the template designer.

   The page opens, displaying the selection criteria that are used to select the contacts.

3. Click **Edit**.

   The selection criteria becomes editable.

4. In each field, select values as required.

   To select one or more values in a multi-select field, hold down the **Ctrl** key and click each value to select.

   To select a range of values in a field, select the first value, hold down the **Shift** key, and select the last value in the range.

5. If you are editing selection criteria for a List, and it is made available by the template designer, enter or, edit the value in the **Cell Size Limit** field.

   This value sets the maximum size of the List.

   📝 **Note:** If your list size is over limit, you are alerted with a message that says, "Only lists with [the limit set in `config.xml` file] or less contacts can be viewed using this feature."

6. Click **Save Changes** to save the selection criteria you chose.

These criteria are used to select contacts the next time that the List is generated or the On-demand Campaign is run.

After you complete this task, you can customize the campaign offer.

Starting an On-demand Campaign

You can run the On-demand Campaign immediately, or schedule a future run of the On-demand Campaign.

Before you perform this task, you must review the target List for the On-demand Campaign, and if necessary revise the target List selection and customize the offer if necessary.

1. Open the On-demand Campaign Summary tab.

2. From the **Status** menu, select **Start On-demand Campaign**.

   The On-demand Campaign is now in the **In Progress** state.

3. To start the On-demand Campaign immediately, in the **Next Run** section of the
   Summary tab, click the **Run** icon (⊙).

On-demand Campaign fulfillment

Corporate marketers can specify On-demand Campaign fulfillment requirements to field
marketers through a custom tab on the On-demand Campaign template.

Local or corporate service fulfillment

Depending on how your administrator configured the On-demand Campaign template, you
might have to fulfill the On-demand Campaign. Or, you might be required to use a corporate
service to fulfill the campaign. Or you might have to choose between these methods.

When you are permitted by the corporate office to fulfill the On-demand Campaign, the
corporate marketers might configure the mail merge feature to facilitate fulfillment.

The mail merge feature

Field marketers or corporate marketers can use the Collaborate mail merge feature to
personalize standard letters by merging a Microsoft Word letter document with a file that
contains contact data for on-demand marketing campaign target customers.

Offer integration in On-demand Campaigns

Offer integration takes the assigned offers corporate marketers design in the flowchart in
Campaign and publishes it to Collaborate.

While the corporate marketer designs the flowchart, they can assign offers to target cells.
When the field marketer runs a flowchart, the offers that are configured by the corporate
marketer are used. They also configure On-demand Campaign templates with the same
flowchart form, and after the template is ready, field marketers can use the template.

The field marketer is only able to choose between available offers for each cell, and the
offer selection is used during a flowchart execution in Campaign.

Field marketers are not able to view or select offers in an instance if offer integration is turned off. If offer integration is turned on, the field marketer is able to view and select offers in an instance.

To enable offers in On-demand Campaigns, in the **Template Properties**, select the **Enable Offer Selection** check box. You are able to view your offers on the **Form Definitions** page.

📒 **Note:** By default, settings for offer integration at template level are disabled.

Republish flowchart after changes

A Campaign user can edit the process configuration of a mail list or call list by changing the offer association with the target cells. Any additional offers or deletion of offers to a target cell creates a version of the flowchart. If the flowchart is already published, **Save & Finish** automatically republishes the flowchart. To notify Collaborate about the changes that are made, the Campaign user saves and publishes the flowchart.

📒 **Note:** If the corporate marketer does not publish the updated flowchart form, the field marketer receives an error message and is not able to run the flowchart.

After the changes are made, a new set of offers with their ID, name, description, and cell information is shown in Collaborate. On the **Form Definitions** page, a merge notification is displayed for that flowchart form. You receive alerts about form republishing or an invalid form whenever a flowchart is republished. You can turn off the form valid/invalid notifications from the **Notification Subscription** page. Opening the form asks the user to merge with the latest list of offers.

Delete offers

Campaign users might delete offers currently being used in flowcharts and in Collaborate campaigns.

If a cell or offer that is used in the flowchart is updated or deleted from the campaign but the user does not publish the flowchart, there is not a version mismatch for the flowchart. While the system runs the flowcharts from Collaborate, if the system verifies that the offer or cell that is used for execution is not correct, the flowchart execution fails.

Deleting offers behaves the same way as republishing flowcharts after changes are made.

Chapter 5. Corporate Campaigns

Corporate Campaigns are marketing campaigns that are planned, scheduled, and executed by a centralized marketing team.

Corporate Campaigns are campaigns that present a corporate marketing message to targeted contacts. In Collaborate, Corporate Campaigns execute on a fixed schedule, which you specify by using scheduled workflow tasks in the Corporate Campaign Workflow tab.

Corporate marketers typically use Collaborate to incorporate recommendations about which target customers to include with a Corporate Campaign from field marketers throughout an organization. A Corporate Campaign allows corporate marketers and field marketers to collaborate on a corporate-level campaign.

Corporate Campaigns and field marketers

When a corporate marketer uses the Subscription task in the workflow for a Corporate Campaign, invited field marketers choose whether to subscribe to the Corporate Campaign.

When field marketers subscribe to a Corporate Campaign, they provide corporate marketers with recommendations about which target customers to include in the campaign or wave.

By using field marketer recommendations, central marketing teams can run programs on behalf of some or all of their field marketing teams, while they allow field marketers to provide input about specific individuals to contact.

Multi-wave Corporate Campaigns and field marketers

When a Corporate Campaign contains multiple waves, and uses the Subscription system task in the workflow, invited field marketers choose which waves to subscribe to. A field marketer can subscribe to any subset of waves in the Corporate Campaign.

Why field marketers participate in Corporate Campaigns

By participating in Corporate Campaigns, field marketers help distribute the marketing campaign effort, enabling the organization to take advantage of the marketing design and strategy expertise that is provided by a central team of marketing specialists, as well as the familiarity field marketers have with their personal contacts.

Corporate marketer's role in a Corporate Campaign

Using Collaborate, corporate marketers present the following to field marketers:

- The campaign marketing initiative, in the form of marketing messages and other materials
- The portions of a proposed target list that are assigned to each field marketer

Field marketer's role in a Corporate Campaign

Field marketers participate in specific Corporate Campaigns. Optionally, you can use the Subscription feature to manage field marketers' participation in Corporate Campaigns. Participating field marketers review their portions of the proposed target list and provide input to corporate marketers about whom to add or delete from the campaign. After each field marketer provides final feedback on their portion of the list, the corporate office fulfills the campaign.

Examples

The following examples illustrate situations in which field marketers decide which customers to include in a Corporate Campaign:

- One field marketer may decide that a particular corporate initiative is not appropriate for some of their assigned customers and removes those customers from the proposed target list.

- Another field marketer may not have enough resources to handle the demand that is generated by the corporate initiative. In this case, the field marketer decides to remove some customers from the proposed target list.
- Another field marketer may want to include customers that are not originally targeted by the corporate marketing campaign, and adds them to the proposed target list.

Corporate Campaign workflow

The workflow for a Corporate Campaign includes designing the campaign, creating a proposed target list, and incorporating field marketer feedback.

Corporate and field marketers typically work on Corporate Campaigns as follows:

1. Corporate marketers design the corporate marketing campaign.
2. Corporate marketers create a Corporate Campaign in Collaborate.
3. Using the optional Subscription workflow task, corporate marketers invite appropriate field marketers to subscribe to the Corporate Campaign.
4. Field marketers subscribe to the Corporate Campaign.
5. Corporate marketers create the proposed target list for the campaign.
6. Corporate marketers notify field marketers of the availability of the List.
7. Field marketers review the Corporate Campaign and provide feedback to corporate marketers on the target list.
8. Corporate marketers can check field marketer review status.
9. Corporate marketers incorporate field marketer feedback to generate the final target list.
10. Field marketers optionally analyze campaign success.

Example flow for creating a Corporate Campaign target list

Corporate marketers generate a proposed target list that field marketers review and revise. Then, the corporate marketer generates the final target list.

In this example, the corporation is a financial institution. A corporate marketer is introducing a new financial product and expects marketing decision feedback from a team of field marketers.

The corporate marketer generates a proposed target list

After you design a marketing campaign for the new financial product, the corporate marketer selects customers from the corporate database who are appropriate recipients of this campaign.

The corporate marketer may use the optional Subscription task in the workflow to invite the appropriate field marketers to participate in the Corporate Campaign.

If the corporate marketer does not use the Subscription task, all field marketers who have access to any records in the original target list (as defined by Data Level Filters) are invited to participate in the Corporate Campaign through its Field Marketer Notify task. If there are no data level filters, all field marketers are automatically invited to participate in the Corporate Campaign, and they receive notifications to review of the target list.

Field marketers review the proposed target list

Field marketers subscribe to the Corporate Campaign. They then review their portions of the target list.

Field marketer target assignments are made through the corporate database. For this example, assume the following target assignments for two field marketers within the same corporation:

- Field_Marketer_1 is responsible for target_FM11 and target_FM12.
- Field_Marketer_2 is responsible for trget_FM21, target_FM22, and target_FM23.

Field marketers can view only those target customers that are assigned to them from a Corporate Campaign, as defined through data level filters.

In this example, the following occurs:

- Field_Marketer_1 accepts both of their target customers on the proposed list.

- Field_Marketer_2 declines all of their target customers on the proposed list because of business constraints.
- Both field marketers finalize their customer selection for the Corporate Campaign.
- Final customer selections that are made by the field marketers are recorded in the database that is used by Campaign.

The corporate marketer generates the final target list

After the field marketers review the proposed customers and make their final decisions, the corporate marketer generates a final target list that incorporates field marketer feedback. When they are satisfied that the list review is complete, they can click **Verify and Lock**, and mark the Review List task as complete in the workflow, to enable the Fulfillment tasks to begin.

Subscriptions

A subscription is the invitation to a field marketer to include their territory in a Corporate Campaign, or a wave of a multi-wave Corporate Campaign.

Through subscriptions, field marketers can control which Corporate Campaigns and waves, and potentially which territories within a campaign or wave, they participate in.

In addition, supervisors can control the Corporate Campaigns or waves their staffs participate in. When a supervisor subscribes to a Corporate Campaign, field marketers that are under the supervisor in a defined territory hierarchy are also subscribed to the campaign. For example, if the territory supervisor for New England subscribes to a corporate campaign, the state manager for Vermont also participates in the campaign.

Subscriptions and data level filters

Subscriptions can be used in combination with data level filters to control both what data is included in the generated list of customers for a Campaign, and who is invited to review the list of customers that is generated.

Example

If MA_FM is the field marketer for Massachusetts (MA), you can use a state-level subscription to invite MA_FM to include or exclude Massachusetts customers from the Corporate Campaign contact list. If MA_FM accepts the invitation, MA customers are on the contact review list. Using data level filters, MA_FM can also be configured to see only MA customers, thus limiting their view to those customers of interest to them. When data level filters are present, only Field Marketers who have data of interest on the generated list are invited by the Notify Field Marketer system task.

Subscriptions can operate at multiple levels. So for example, NE_FM might be the Northeast Regional FM who supervises the state field marketers in their region, which might include Massachusetts. The corporate marketer can invite regional field marketers to subscribe for their region.

If NE_FM is invited to subscribe, they can accept or decline. If they accept, data for all customers in their region are included in the list generation. So continuing the example above, data for Massachusetts's customers would be included in the list. In this case, the MA_FM has no control over whether MA data is included, because the subscription invitation is issued at the region level. However, if the data level filters are configured to allow MA_FM to see MA customers, MA_FM is invited to review the MA customers when the Corporate Campaign contact list is generated.

Defining territories

To support subscriptions, the administrator must define a territory hierarchy on the Collaborate server. For more information, see the Collaborate Administrator's Guide.

Subscribing to a Corporate Campaign

Field marketers can subscribe to any Corporate Campaign, or wave of a multi-wave Corporate Campaign, for which they are an appropriate user, which is based on the Corporate Campaign's or wave's subscription level.

Click **Alerts**.

If there is a new Corporate Campaign or wave to which you can subscribe, you see an alert that begins, "You received the subscription request wave_name subscription_task_name."

You can also subscribe to a Corporate Campaign or wave by viewing the new subscriptions in your home page.

Corporate Campaign proposed target lists

The proposed target list for a corporate marketing campaign is the initial list of customers for whom the campaign is intended when the campaign is first designed by a corporate marketer.

These customers are associated with field marketers in the corporate database; for example, the associations may be based on the customer's region.

Field marketers are assigned those proposed target customers in a Corporate Campaign to whom they are associated. They must then review those customers and decide on the final list for the Corporate Campaign.

Field marketers can:

- Accept or decline each customer.
- Add target customers to the list of proposed customers.
- Finalize the target list for the Corporate Campaign.

Corporate Campaign proposed target lists review

There are several tasks field marketers can perform for Corporate Campaigns.

Field marketers typically perform the following tasks for Corporate Campaigns to which they are subscribed:

- Review Corporate Campaign status information and other data in the **Corporate Campaign Summary** page.
- Review attachments to the Corporate Campaign.

Corporate marketers may include attachments to provide field marketers with information that is relevant to the Corporate Campaign. For example, an attachment may contain marketing messages.

- Review their portion of the proposed target list.
- Provide the corporate marketer with recommendations for modifications to the proposed target customer list.

Note the following:

- The changes field marketers make to the proposed target customer list are stored in the corporate database; corporate marketers access the changes there.
- When field marketers finalize their portions of the proposed target list, target customer review data status is updated in a database table.

Adding customers to a Corporate Campaign

Field marketers can add target customers to a proposed list for a Corporate Campaign to which they subscribe.

Corporate marketers may propose that the list targets previous customers, for example, while field marketers have new target customers in mind. Field marketers can filter their lists of personal contacts to select target customers to add.

When field marketers add customers to the proposed list for a corporate marketing campaign, they can select a set of customers with specific characteristics. For example, corporate marketers can allow field marketers to select from the following criteria when adding customers to a proposed list:

- Name
- Age
- Income range

Reviewing proposed target customers for a Corporate Campaign

When you participate in a Corporate Campaign, you must review the proposed target customers for that campaign.

When you are presented with a proposed list of target customers for review, you must either accept or decline each customer before you can finalize your target list selections for the corporate campaign.

You can accept or decline proposed target customers individually, or all at one time. You can also add one or more of your customers to the proposed list.

In recurring Corporate Campaigns, if you are allowed to do so by the campaign creator, you can add to or exclude contacts from a list for each recurrence of the workflow. When you add or remove contacts in this way, the changes you make remain in effect throughout all list review tasks within the recurring workflow. If you are not allowed this option, you can modify only the target list for the current occurrence of the workflow.

1. Open the Corporate Campaign.

2. In the **Summary** page, click **Waiting items**.

   The **Contact to Validate** page opens.

3. Accept or decline customers as needed.
   - To accept all proposed customers, click **Accept All Records**.
   - To decline all proposed customers, click **Decline All Records**.
   - To accept specific customers only, check the **Accept** column in the rows for those customers.
   - To decline specific customers only, check the **Decline** column in the rows for those customers.
   - To decline specific customers permanently, check the **Dec. Perm.** column in the rows for those customers.
   - To add customers:
     a. Click **Search and Add Records**.

Records added using this link get added to the **Newly Added by Field Marketer** list.

> 📝 **Note:** This link is not available on the list manager screen for **Declined Records**.

b. Select one or more target list filtering criteria from the options that are presented on the form, then click **Search**.

The target records resulting from your search are displayed.

c. Check one or more of the customer records to add to the target list.

d. Click **Accept Selected**.

If you selected to add or delete contacts permanently, a message opens asking whether you want to add the contacts permanently for recurring campaigns.

e. Click **OK** to make the additions permanent.

Or click **Cancel** to make the additions apply to the current occurrence only.

4. **Optional:** Check **After the next save, consider my review complete** to validate and lock this list when you save changes.

> 📝 **Note:** If you do not check this option, any customer records that you do not accept or decline are displayed when you next review the target contacts.

> 📝 **Note:** Added contacts do not display until you close the window and click **Newly added by Field Marketer**.

5. Click **Save** to save changes and complete your review of the proposed target list.

Accepted and removed contacts disappear from the list, and are only viewable in the Accepted/removed lists page.

Making permanent additions and deletions to a list

When you work with a recurring workflow, you might be tasked with several list review steps within the course of a single Corporate Campaign.

If wanted, you can make permanent additions or deletions from the list; these additions or deletions remain in effect for all future occurrences of the List Review task.

📒 **Note:** The ability to make permanent additions or deletions to a contact list is controlled by the Review List task in the Corporate Campaign workflow. If this option is not selected for a List Review task, you are not able to add or delete contacts permanently in the corresponding list.

When to add or remove contacts permanently

You should make permanent additions or deletions to a list when the following statements are true:

- You are using a recurring workflow.
- The recurring workflow includes several List Review tasks.
- You know that the list as generated is incomplete; you need to add or delete contacts. You want these additions and deletions to remain in effect for each future occurrence of the recurring campaign.

Viewing or accepting previously declined targets

You can view previously declined target customers before you finalize your portion of the proposed target list, and, if wanted, accept those customers.

1. Open the Corporate Campaign for which you declined target customers on the proposed list.

2. Click **View Declined**.

3. You can accept any declined target customers from this list by checking the customer entries under the **Accept** column.

   You can also select **Accept All Records** or **Set All Records to Review** to accept or review all the previously declined records.

Those customers are now included in the list.

You must now finalize the list.

Viewing or declining previously accepted targets

You can view previously accepted target customers before you finalize your portion of the proposed target list, and, if wanted, decline those customers.

1. Open the Corporate Campaign for which you accepted target customers on the proposed list.

2. Click **View Accepted**.

3. You can decline any accepted target customers from this list by checking the customer entries under the **Decline** column.

   You can also select **Decline All Records** or **Set All Records to Review** to decline or review all the previously accepted records.

Those customers are now removed from the list.

You must now finalize the list.

Viewing or removing added targets

You can view previously added target customers before you finalize the proposed target list. You can also remove previously added target customers.

1. Open the Corporate Campaign for which you added customers to the proposed list.

2. Click **View Additions**.

3. You can remove any added target customers from the list by checking the customers under the **Remove** column.

   You can also select **Decline All Records** to decline all the previously accepted records.

Those customers are now removed from the list.

You must now finalize the list.

Finalizing your portion of a Corporate Campaign target list

You can finalize the proposed target list for a Corporate Campaign by validating and locking the target list.

You can finalize the proposed target list after you have:

- Reviewed the proposed target list.
- Accepted or declined each customer in the proposed target list.
- Optionally, added target customers to the proposed list.

1. Open the Corporate Campaign.

2. In the **Summary** page, click **Validate and lock list**.

   📝 **Note:** You cannot reverse this action.

The list is now finalized.

Field marketer access to Corporate Campaigns

By default, only corporate marketers are authorized to create and modify all aspects of Corporate Campaigns. As a field marketer, you can view Corporate Campaigns to dwhich you subscribed.

You can view proposed target customers that are assigned to you. You cannot view target customers that are assigned to other field marketers.

You can typically perform the following tasks:

- View the Corporate Campaign summary.
- View any attachments included with the Corporate Campaign.
- Review, accept, add, or remove target customers from the proposed target list.

- Finalize your portion of the proposed target list.
- View the calendar to see the Corporate Campaign schedule.

For more information about your access privileges, see you administrator.

Chapter 6. Collaborate Reports

The following section includes the details on various reports that Unica Collaborate offers. The Collaborate reports are grouped as follows.

- Corporate Marketer reports
- Field Marketer reports

Field Marketer reports

Field Marketer Contact List Acceptance

The report lists the field marketers participating in the campaigns (by campaign) and the number of items which are accepted, added, declined, waiting, and targeted.

Field Marketer Corporate Campaign Performance Comparison with Revenue

This report lists the marketers who participated in corporate campaigns and their level of participation in terms of how many of their contacts participated and the revenue generated.

Field Marketer List Profile

This report provides the profile details of Collaborate campaigns in terms of a selected list and the report user's selected parameter (age, age range, education level, income, etc).

Field Marketer On-demand Campaign Performance Comparison with Revenue

This report compares all selected campaigns and the performance of those campaigns with revenue metrics.

Field Marketer On-demand Campaign Performance Over Time with Revenue

This report focusses on the on-demand campaigns in Unica Collaborate. It includes revenue metrics, whereever applicable and available

Field Marketer On-demand Campaign Performance Over Time

This report focusses on the on-demand campaigns in Unica Collaborate, but does not include revenue metrics.

Chapter 7. Workflows

To help you complete different workflow-related efforts, the **Workflow** tab offers different view modes and an edit mode.

To record and track the tasks that need to be completed during a project, you add information to the project Workflow tab. Project managers add tasks, organize them into stages, and identify dependencies, personnel, and other related information. Project participants update task status and scheduling data, add attachments.

You can manage tasks that are associated with an Advanced List, On-demand Campaign, or Corporate Campaign. The Workflow tab provides a spreadsheet on which you can list all tasks. You can assign dates and team members to each task.

When a project manager creates a Corporate Campaign, On-demand Campaign, or Advanced List, the selected template can provide an initial workflow. The project manager can then use the Workflow tab to customize the workflow that is provided by the template to meet specific needs.

Team members that are assigned to a Corporate Campaign, On-demand Campaign, or Advanced List use the Workflow tab to track their work. Any team member that is involved in the Advanced List, On-demand Campaign, or Corporate Campaign (with the appropriate access permission) can edit any value on the Workflow tab.

Workflow concepts

Workflows organize the tasks, stages, and milestones for each project. Workflows measure the time that is spent on each part of the project and the people who are assigned to work on it.

Tasks

Tasks are steps in the workflow where a user or the system acts. The task is not complete until the action is complete.

Stages

You can group tasks together under headings called stages. Stages can help you with task organization. For example, you can create a stage that has all tasks your field marketers-specific users do. In spreadsheet view mode or edit mode, stages are the headings in bold that group the tasks together.

Milestones

You can identify workflow tasks as milestones for your project. Example milestones include Job Start, Meeting, and Event.

Dates

Workflows contain the following types of dates.

- **Forecast/Actual dates** begin as forecast dates: future dates when a task owner plans on starting and completing a task. These dates are specified while the task is still pending. When a team member a starts and completes a task, the same dates can be used or different dates that are supplied as the actual dates.

  Actual dates specify when tasks start and finish.
- **Target dates** are dates that are used to plan the project schedule. Typically, they are set at the beginning of the project.
- **Anchored dates** are fixed dates that cannot change, even if the dates of the tasks upon which they are dependent change.
- **Non-work time** represents dates when people do not work, so the system skips those dates when it calculates durations for tasks. Collaborate currently supports system-wide non-work time that applies to all tasks. It is up to the project managerList, On-demand Campaign, or Corporate Campaign manager to determine whether overriding any of these dates is necessary. System administrators enter and maintain these dates.
- **Weekend dates** are dates that you use to specify work that occurs on a weekend on a per-task basis. You can schedule work on a weekend date by using the Schedule Through option for each task.

Duration

Duration is the actual number of days that are assigned to a task. When you assign start and end dates, the system automatically calculates the difference between the forecast or actual start date, and the forecast or actual end date for a task. The actual number of days between the start and end dates equals the duration of the task.

You can assign duration by using any non-negative number. For example, you can use 0.25 to assign a quarter of a day for the task duration.

Duration is the actual number of days that are assigned to a task. The duration control is in a `DD-HH-MM` format. You can enter up to 999 days value for the `DD` field, your applicable business hours that are based on the beginningOfDay and numberOfHoursPerDay configuration settings for the `HH` field, and a value in 30-minute intervals for the `MM` field.

Effort

The work effort in days (as opposed to duration) that it takes a user to complete a task. For example, a task takes three calendar days to complete, but the task owner spends only half a day on the task for each of the three days. In this case, the effort for the task is one and a half days even though the duration is three days.

Locked tasks

When you edit a task, the task is locked so no other user can edit it at the same time.

People and roles

You can assign tasks to individual team members or you can assign tasks to all team members in each role. When you assign a task to one or more team members, they are considered to be task owners. You assign roles to team members on the People tab of the List, On-demand Campaign, or Corporate Campaign.project.

Workflows use the following concepts to identify people in the workflow.

- **Task owners** are the people responsible for running or managing workflow tasks.
- **Roles** are used as a bridge between tasks and people. They are useful for assigning work on a generic basis. For example, each type of project you create can have its own

workflow template, and the template can contain standard roles for certain tasks. Then, when you create a project, some (or all) of the tasks have a default role that is already associated with them.

- **Roles** are used as a bridge between tasks and people. When a role is assigned to a task in a List, On-demand Campaign or Corporate Campaign, all users that are associated with that role are owners of the task. Templates can contain roles for certain tasks. Then, when you create a List, On-demand Campaign or Corporate Campaign, some (or all) of the tasks have a default role that is already associated with them.

📝 **Note:** Each workflow might contain users from different timezones. You chose whether Collaborate displays the timezone after the time stamps on the workflow and workflow columns.

About global suppressions and global suppression segments

Use the global suppression feature to specify a list of IDs (in a single audience level) that are automatically excluded from all cells in flowcharts in Campaign.

You do this by creating this list of unique IDs as a strategic segment, then by specifying that segment as a global suppression segment for a particular audience level. Only one global suppression segment can be configured for each audience level.

📝 **Note:** Specifying and managing global suppression segments requires the appropriate permissions and is performed by your Campaign administrator. For details, see the *Campaign Administrator's Guide*.

System tasks

System tasks are workflow tasks that start automatically, based on a combination of start date and completion of tasks on which they are dependent.

You can create these types of system tasks:

- Subscription

- Flowchart Run

- Notify Field Marketers

- List Review

- Recurrence

📝 **Note:** When you pause a workflow, system tasks that are scheduled during the time the workflow is paused do not run until the workflow resumes.

Flowchart Run system task

A Flowchart Run system task allows you to specify a flowchart that should run at a particular place in the workflow.

When you create a Flowchart Run system task, you specify one of the following:

- For corporate marketers that are working with Corporate Campaigns, the name of the flowchart in the linked campaign (in Campaign) in the workflow.
- For field marketers that are working with On-demand Campaigns and Lists, the name of the tab that is associated with the flowchart in the On-demand Campaign or List that you want to use to gather data.

When Collaborate runs a Flowchart Run system task, flowchart run is started in Campaign.

Flowchart Run system tasks start and finish automatically when there is a matching flowchart in Campaign, when the target start date is reached and when all tasks it depends on are finished; you do not need to manually start or stop a Flowchart Run system task. The **% Complete** field completes automatically as the task proceeds.

Flowchart Run tasks with no assigned flowchart

The icon for the Flowchart Run system task displays red when no known flowchart is assigned to the task. After you assign a flowchart, the color of the icon changes to black.

Flowchart Run tasks and Corporate Campaigns

For Corporate Campaigns, for the Flowchart Run system task to run correctly, you must save and publish the flowchart of the linked campaign in Campaign.

List Review system task

The List Review system task allows you to identify time within the workflow during which Field Marketers review contact lists that result from a flowchart run.

Unlike any other Workflow Task, this task can be finished by a link present on Summary Tab of On-demand Campaign. Without going to workflow tab, you can finish this task directly from Summary Tab.

📝 **Note:** A List Review system task must depend on a Flowchart Run system task.

List Review system tasks start and finish automatically. You can manually finish a List Review system task when you are sure that all Field Marketers completed the review. After you manually finish the List Review task, the next dependent task (if any) in the workflow starts when its target start date is reached.

When the List Review is completed, manually or automatically, the List is locked to field marketers; field marketers can no longer change their portions of the List.

The two permissions, Update System Task status and Update all System Task, are applied to all Workflow System Tasks along with List Review Task. If these permissions are not granted, then a task cannot be completed from workflow along with List Review Task. List Review can be finished from the **Summary** tab of an On-demand Campaign by clicking **Finish List Review**, even if these security permissions are not granted in the Security Policy.

To specify the number of records to show, you can use the Limit List View option. In List Manager, only the number of records that are specified in the List Review Task are displayed.

If you use a third-party tool to create a list of IDs, you can import them by clicking **Import IDs**. From the **Import IDs** window, you can specify a `.csv` file that contains the customer IDs, the delimiter in the `.csv` file, and the audience level. The `.csv` file should include

columns required to uniquely identify a customer based on an audience level. After you click **Import**, the List Manager data is updated with the new imported data to the newly added List. Data from the `.csv` that is a duplicate or is invalid is displayed.

The fields to limit additions are as follows:

- On list review pop-up for templates of On-demand Campaign, Corporate Campaign, and Advanced Lists.
- Corporate Campaign - it is displayed and editable for corporate marketers only. In the case of corporate campaigns, field marketers cannot access this pop-up that is based on security settings. Even if they are allowed access, they can view but cannot edit the settings.
- On-demand Campaigns and advanced lists - these fields are displayed but cannot be edited

If the value of Limit List View option is set to limit the number of records that can be viewed, then the field is automatically set to select the second radio button option with value set to "0." You get an explicit message that no records can be added when the list view is limited. If Unicode characters are present in the List code either by adding an ID prefix or entering manually, then you are not able to export a customer list from List Manager window.

📝 **Note:** User cannot set both number and percent. For example, to limit to 10% with a maximum of 100.

In the List Manager task, you can specify the available Display Formats. You can identify or filter by Audience Level. Only formats that are selected in the List Review Task are available.

List Review system tasks and recurring workflows

In recurring On-demand Campaigns or Corporate Campaigns, you can enable permanent updates so that any additions or removals that take place during List Review are applied automatically in all occurrences.

List Review system tasks and multi-offer campaigns

In multi-offer On-demand Campaigns or Corporate Campaigns, you can divide a list that is generated by a single Flowchart Run system task into several segments. The results of the Run Flowchart system task are presented as several Lists.

Recurrence system task

Recurrence starts when predecessors are complete. It then recalculates previous dependent tasks that target the start date when these previous tasks are set.

The available recurrence types are Monthly, Weekly, Daily, and Hourly. Date and time calculations must apply to working hours and business days.

On the **Recurrence** tab, you are given the option to choose the Campaign Workflow Type (Nonrecurring or Recurring). After selecting the workflow type, you are able to choose Frequency and Time between occurrences.

There can be only one recurrence task in a sequence of dependant tasks. A control is made when saving the workflow.

Hourly recurrence

For Template Run Flowchart Task Recurrence, you have the Ending option where you can choose No End or Total number of occurrences. You also choose Permissions to modify the recurrence in the instance (All options, No option, and All options but frequency). Run Flowchart Task properties if the recurrence on task is chosen. You can also get a preview of the next occurrences.

📒 **Note:** All options allow you to turn from Not recurring to Recurring.

For Instances Run Flowchart Tasks, under the Recurrence tab, you have a start date to choose along with the Ending (no end, total number of occurrences, and end by).

Creating a flowchart run task

You create a flowchart run task through the workflow spreadsheet.

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add a Row** icon (　⊕　).

3. Select **Flowchart Run**.

   A new task row is added to the flowchart.

4. In the **Flowchart Name** column, perform one of the following tasks:
    - For Corporate Campaigns, enter the name of the flowchart from your linked campaign.
    - For On Demand Campaigns and Lists, select the name of the tab that runs the Campaign flowchart.

5. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

   You can also change the name of the task.

6. Click **Save and Finish**.

If the workflow is part of a Corporate Campaign, you must save and publish the associated flowchart in Campaign.

Creating a List Review system task

You can create a List Review system task through the workflow spreadsheet.

1. In the workflow spreadsheet, in Edit view, select the row after which you want the Flowchart Run task to appear.

2. Click the **Add a Row** icon (　⊕　).

3. Select **List Review**.

   A new task row is added to the flowchart.

4. Complete the **Schedule Through**, **Target Start**, **Target End**, **Duration**, and **Member Role** fields as desired.

   You can also change the name of the task.

5. Make the new List Review system task dependent on a Run Flowchart system task.

6. Click **Save and Finish**.

7. If you are working on a multi-offer campaign:

   a. Click the name of the List Review system task.

      The Task properties screen opens.

   b. In the **Segment Code** field, enter the name of the segment as it appears in the flowchart in your linked campaign.

   c. Click **Save and Return**.

You can now enable permanent updates to a list.

Enabling permanent updates to a list

To enable permanent updates to a list, check the **Allow permanent updates** check box.

1. In the workflow spreadsheet, in Edit view, double-click the List Review system task that you want to change.

   The Post Task dialog box opens.

2. Check the **Allow permanent updates** check box.

User tasks

User tasks are workflow tasks that you define and that must be started manually.

You can add a user task to the workflow to accommodate the time necessary to develop creative material for the campaign, followed by a user task to approve the creatives.

Users must manually update the status and progress for user tasks.

Task status

Each task in a workflow has a status, which is shown in the spreadsheet view.

You can also view and modify the status by clicking the task to open the Post Task dialog box.

The task status can be:

- Active
- Pending
- Finished
- Skipped

⚠ **Important:** If you change the status of a task from Finished to Pending, you must change the percent complete value to `0%`.

Editing workflow spreadsheets

When you create a Corporate Campaign, Advanced List, or On-demand Campaign, a wizard that is based on the template you selected collects information. After you complete the wizard pages, you can customize the default workflow that is provided by the project template.

Before you can edit a workflow, the Advanced List, On-demand Campaign, or Corporate Campaign must not be in the **In Progress** state. If it is, you must pause it.

In addition to project templates, which can include workflow tasks and values, your installation can maintain a set of workflow templates. Workflow templates are template components that are independent from project templates. While a project is in the Not

Started status, you can assess whether the workflow supplied by the project template is adequate or if a different workflow template provides a better starting point. For more information about workflow templates, see the Collaborate Administrator's Guide.

The ability to customize template-supplied workflows is controlled by your user permissions. If toolbar icons are unavailable or if values are read-only, you do not have the appropriate permissions to edit the workflow.

1. Open the new Advanced List, Corporate Campaign, or On-demand Campaign and click the **Workflow** tab.
   The workflow displays as supplied by the template.

2. Click **Edit** (⬚).
   The spreadsheet displays in edit mode. For information about the options in this mode, see Edit mode toolbar *(on page 110)*.

3. To replace all spreadsheet rows and values with data from a previously defined workflow template (if the project is in Not Started status), click **Tools > Import and save workflow**.
   A warning that this procedure deletes the current workflow displays. Click **OK**, then select a workflow template and click **Import**.

4. To change default task and stage names to reflect your specific tasks and stages, click in the cells in first column to make your edits. You can also change task dependencies. For more information about dependencies, see Task dependencies *(on page 80)*.

5. To add rows to the spreadsheet, click **Add a Row** (⊕) and then select **User Task**, **one System Task**, or **Stage**.
   For more information, see Adding a stage or task *(on page 82)*.

6. To add a stage, click **Add a Row** icon (⊕) and then select **Stage**.

7. Enter target or forecast/actual dates for the tasks, depending on how you want to use the schedule.

- You can enter a start date, end date, and duration for a task. If you enter any two of these values, the system calculates the third value automatically. For example, if you enter a target start and a target end date, the system calculates the duration.
- While the Schedule Through column indicates work days for a task, you can enter any date as a start or end date. For example, for a task that is not scheduled to include weekends you can still pick a Sunday as the end date.

8. To specify that a task is a milestone, such as a drop date, click the **Milestone Type** column and select a milestone from the list.

   Your administrator sets the milestones options in this list.

9. Select members or roles to assign the task to in the **Members** and **Member Roles** columns .
   For more information, see Adding roles and members to tasks *(on page 75)*.

10. Make other selections and entries in the spreadsheet to reflect the workflow for your Advanced List, Corporate Campaign, or On-demand Campaign.

11. Enter any instructions or notes about a task in the **Notes** column.

12. Click **Save** to save your changes.
    - Click **Save and Finish** to save your changes and return to spreadsheet view mode.
    - Click **Save and Resume** to change the status to **In Progress** and return to spreadsheet view mode.
    - Click **Cancel** to undo any changes and return to view mode.

Adding roles and members to tasks

When you create a Corporate Campaign, Advanced List, or On-demand Campaign, the workflow automatically includes member and reviewer roles for all tasks if the template you selected provides this information. However, you can edit workflow tasks to assign different roles.

To add roles and members to tasks, complete the following steps.

1. Navigate to the **Workflow** tab of your Corporate Campaign, Advanced List, or On-demand Campaign.

2. Click **Edit** (✎).

3. To select or change the member roles, click in the **Member Role** cell for the task you want to change.

4. Click the turndown icon (▾) to view the list of available roles.

5. Click to select one role, or Ctrl+click to select more roles to assign to this task.

6. To select or change specific members, click in the **Member** cell for the task you want to change.

7. Click the turndown icon to view the list of available members.

8. Save your work.

If you have the "View people tab" and the "Edit team members and roles" permissions, you can select any users or roles, even if they were not included on the **People** tab. When you add a user to the project workflow, the system adds the user to the **People** tab automatically.

Filling data into a range of cells

To reduce data entry time, you can copy data that is entered for one or more tasks and supply it for another task or tasks by using **Tools** options.

For example, you have 10 consecutive tasks with the same values for target start, target end, target duration, and target effort. You enter the data for the first task. To copy the values that are in the first row into the remaining nine rows, Shift+click to select the cells in those four columns for all 10 tasks. Then, use the **Fill Down** option.

You can also copy the data in one or more adjacent cells and paste it into one or more adjacent cells. See .

📒 **Note:** The options for working with a range of cells apply to adjoining cells only: use Shift+click to select the cells.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign that has the task values to duplicate, and click the **Workflow** tab.

2. Click **Edit**.

3. Shift+click in the first cell to select it.

4. Move the cursor to the last cell you want to include, then Shift+click in this cell.

   The range of cells you selected is highlighted.

   📝 **Note:** You must select a continuous range of cells, rather than selecting multiple, disconnected cells.

5. Click **Tools** (🔧) and select one of the following options:

Option	Description
Fill Down	Copies the values in the top-most selected cell (or cells) to all the other selected cells, including the bottom-most.
Fill Up	Copies the values in the bottom-most selected cell (or cells) to all the other selected cells, including the top-most.

6. Click **Save**.

Printing the Workflow tab

You can either print all information found on your Advanced List, On-demand Campaign, or Corporate Campaign Workflow tab, or select certain columns of information to print.

1. From the Workflow tab, click **Print** (🖶).

   A dialog opens with a list of the spreadsheet columns. By default, all columns are selected.

2. Click to clear any columns you do not want to include when you print.

3. **Optional:** Clear the **Shrink to Fit Landscape Page Width** check box to print the columns at a size of 100%.

   If you keep this option checked, all selected columns print on a single page. If you use this feature, change your printing preference (for this print job) to landscape.

4. Click **Print Selected Columns**. A preview dialog opens.

5. Click **Print**.

6. Select your printer and printer options. Choose landscape mode for best results.

7. Click **Print** to print the selected workflow columns.

8. In the preview dialog, click **Close** to close the print preview.

Adding an attachment to a task

To add attachments for a task, a project owner must enable adding attachments for the task. New attachments are added to the **Attachments** tab for the task.

The following users can add or remove task attachments.

- Task owners can add attachments only to their tasks.
- Task owners and users with the Delete Attachment security permission for projects can delete task attachments.

Adding attachments to tasks is similar to adding attachments to other objects. However, note the following behavior that is specific for adding attachments to tasks.

Note the following restrictions:

- There is no versioning for task attachments: uploading a new version overwrites the existing version of the attachment.

- It is possible to have multiple task attachments with the same name for the same task. This situation can occur if multiple owners of the task each upload a file with the same name. You can differentiate the files by the user who created the attachment.
- You can add and remove attachments no matter the state of the task. That is, even if a task is marked complete or skipped, you can still add and remove attachments.
- The Attachments tab for a Corporate Campaign, On-demand Campaign, or Advanced List is divided into two sections: one for files that are attached directly to the Corporate Campaign, On-demand Campaign, or Advanced List, and one for files that are attached to the tasks.
- If a task owner adds task attachments, and later the Corporate Campaign, On-demand Campaign, or Advanced List owner sets the **Enable Task Attachment** flag to false, attachments can no longer be added or removed from the **Post Task Update** dialog. However, task attachments for the Corporate Campaign, On-demand Campaign, or Advanced List can still be removed from the Attachments tab.

1. Navigate to the task to which you would like to add an attachment.

   Click the task from a project workflow or from the Tasks list page.

   The **Post Task Update** dialog box opens.

2. Click the **Attachments** tab.

   The tab displays any attachments that exist for the task.

3. In the **File to Attach** field, select **From My Computer** or **URL**.

4. Complete one of the following actions:
   - Click **Browse** to attach a file that is on your computer. When the dialog box appears, navigate to the file you want to attach and click **Open**.
   - Enter the URL in the field provided.

5. Add any comments about the attachment.

6. After you add all your attachments, click **Save and Return** to close the dialog box.

Task dependencies

Collaborate offers different options for managing task dependencies as new rows are added to a workflow spreadsheet and existing rows are removed.

In spreadsheet edit mode, you click **In Series** and select one of the following options:

- **No Dependencies**: the system does not create dependencies for new rows automatically. If you need dependencies for the new tasks and stages, edit the task name to add them manually.
- **In Series**: the system inserts new rows into an existing chain of tasks.
- **In Parallel**: the system inserts new rows in a dependency branch that is parallel to an existing chain of tasks.

Inserting tasks in series

Inserting **In Series** makes a new task dependent on the task before it, and then makes all items that depended on that task dependent on the new task.

You insert a task in series when it can start only after the previous task is complete. For example, in this figure, if task X cannot be worked on until task B is complete, you insert task X in series.
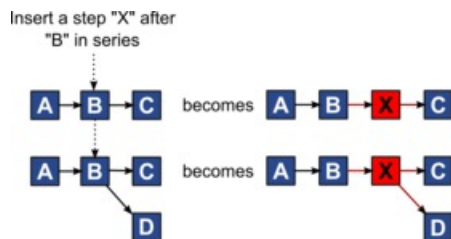

Inserting tasks in parallel

Inserting **In Parallel** makes the task dependent on the items (tasks or stages) that the task before it depended on. This action makes the items that are dependent on the previous task also dependent on the new task.

You insert a task in parallel when it can be worked on at the same time as another task. For example, in this figure, if task X can be worked on simultaneously with task B, you insert task X in parallel.
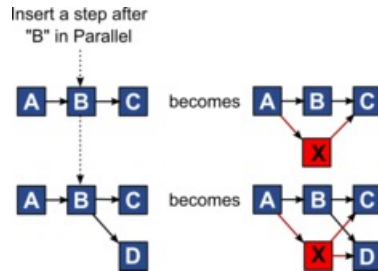
Deleting tasks

Deleting a task removes the selected task from the chain. Then, the system relinks the two remaining segments of the chain together so that it is one continuous chain again.
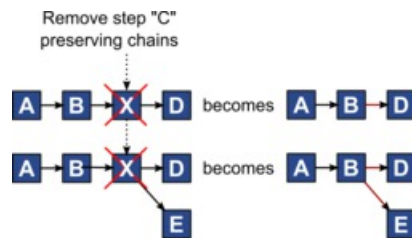
When a task is deleted, its dependent tasks are made dependent on its dependencies before the deletion takes place. This practice preserves all sequential chains of dependencies.

Default and "last used" modes

To make adding a task as simple and consistent as possible, Collaborate provides the following behavior.

- The default mode is **In Series**. When you begin an editing session, this mode is used as the insertion mode.
- The "last used mode" is remembered for each editing session. When you select a different dependency mode, it is used each time that you add a task until you change it again or end the editing session.

- For example, to add several tasks in parallel, you need to select **In Parallel** mode only one time. Then, every time you insert another task, the system inserts it in parallel unless you explicitly select another mode.

If needed, you can change the dependency that is assigned by the system manually. Click the task name, then edit the comma-separated list of task numbers that display in parentheses after the name.

Adding a stage or task

To add a task or stage to a workflow, you must have the appropriate permission for the related template.

If the **Add** option is missing from the toolbar, contact your administrator about obtaining the appropriate access rights.

Note the following information about stage and task rows.

- To differentiate stages from tasks, the rows for stages display in the spreadsheet with a shaded background.
- When you add a stage or task, you can indicate where in the spreadsheet to insert it: enter the stage number and the task number before the task name.

  For example, if you enter `2.3 Have team meeting` anywhere in the task list, the task is placed under the task that is labeled 2.2. Any subsequent tasks in that stage are automatically renumbered: the step that was previously labeled 2.3 is now 2.4.
- You can move a stage or task to a different part of the spreadsheet. Use the up and down options on the toolbar to move the stage or task to the appropriate place.
- There are several options for managing dependencies on tasks as new rows are added and existing rows are removed. For more information, see Task dependencies *(on page 80)*.

Stage and task sequence

If you change the number for a task or stage, the task is inserted before the row that matches the new number.

For example, assume the following stage order:

1. Planning
2. Collateral Design
3. Lead Generation
4. Show Setup-to-Breakdown
5. Marketing Review

If you edit task 5, Marketing Review, changing its number to 3, the new order is as follows.

1. Planning
2. Collateral Design
3. Marketing Review
4. Lead Generation
5. Show Setup-to-Breakdown

Now suppose that you edit task 2, Collateral Design, changing its number to 4. The new order is as follows.

1. Planning
2. Marketing Review
3. Collateral Design
4. Lead Generation
5. Show Setup-to-Breakdown

To move a task or stage to the end, give it any number higher than the final task or stage. For example, to move stage 2, Marketing Review to the end, change its number to 6 or higher.

Adding rows to the workflow spreadsheet

Add rows to the workflow spreadsheet to add more tasks, System tasks, and stages.

Before you can add a row to the workflow spreadsheet, you open the workflow in edit mode. For more information, see [Edit mode toolbar (on page 110)](#).

1. Decide what dependency option you want the new task or stage to use: Click **In Series**

   (⊞) and select **No Dependencies**, **In Series**, or **In Parallel**.
   Your selection remains in effect until you change it again.

2. In the workflow spreadsheet, click the stage or task name that you want the new row to follow.

3. Add the stage, task, or system task: Click **Add a Row** (⊕) and then select **User Task, a system task**, or **Stage**.

   Collaborate adds the new row to the spreadsheet. Stages display with a shaded background; tasks.

4. **Optional:** Change the dependency that is assigned by the system to the row. The numbers of the tasks that a task or stage depends on display in parentheses after the name. If a date for one task changes, the system changes the dates for all the dependent tasks.

   For example, suppose that you add a task and its name is `2.5 Deliver draft to vendor (2.4)2.5 Generate List (2.4)`. To make this task dependent on task 1.3 instead of task 2.4, change the task name to `2.5 Deliver draft to vendor (1.3)2.5 Generate List (1.3)`. To make this task dependent on both task 1.3 and task 2.4, separate the task numbers with commas: change the task name to `2.5 Deliver draft to vendor (1.3, 2.4)2.5 Generate List (1.3, 2.4)`.

   For more information, see [Task dependencies (on page 80)](#).

5. When you finish editing the workflow, save your changes.

The stage or task is added to the workflow after the insertion point.

Milestones

A milestone is a point in time within workflow at which all tasks until that time must be complete in order for work to continue.

Your system relies on the display order of the task to find out the prior tasks. All tasks that are displayed before the milestone task on the workflow screen are assumed to be a part of that milestone. If tasks before the milestone are not complete, then the milestone is not met and the next task cannot begin. If the prior tasks are not complete, your system shows the appropriate error message, saying all prior tasks in the milestone should be complete to mark the milestone as complete or active. In that case, the system stops you from updating the milestone task.

Why use milestones

By using milestones within a workflow, you can better enforce process for your lists and campaigns, so that tasks take place in the intended order. In addition, the specific milestones you select in a workflow aid in reporting.

How available milestones are defined

To add milestones, click **Collaborate Settings > List Definitions > Workflow Milestone Types**.

📝 **Note:** You must have administrative privileges to define milestones. Specific milestones are also available for selection as defined in a database table by your administrator.

A milestone cannot be removed if it is used in an instance (Corporate Campaign, On-demand campaign, or Advanced List).

Note: A milestone can be removed if it is used in template, but it cannot be removed if it is used in instance.

Disabled milestones are not shown while you create an instance or template. They are shown in instances or templates where they are already used, however.

Setting milestones in a workflow

You can set milestones for tasks within a workflow for an Advanced List, On-demand Campaign, and Corporate Campaign from the Milestone Type column.

When you set a milestone, the next task in the workflow cannot begin until the milestone is reached.

Example

Consider a scenario of three user tasks followed by flowchart run system task. A milestone is declared at 1.3 task.

If you try to update the status of the milestone task (1.3 in this case), your system performs a check to ensure that all prior tasks are complete.

When your system tries to start Task 1.4, it checks the status of the earlier milestone task. If milestone is complete, only then can task 1.4 begin. Otherwise, the appropriate error message would be shown to you and the task does not start.

By using a milestone at task 3, you can ensure that all creatives for the On-demand Campaign are approved by the necessary people before campaign fulfillment begins.

Defining a milestone for a task

You can set a milestone for a task to ensure that task is complete before the workflow proceeds.

Before you can define a milestone for a task:

- You must define milestones by going to **Collaborate Settings > List Definitions > Workflow Milestone Types**.

  📝 **Note:** You must have administrative privileges to define milestones.
- The **Milestone Type** column must be present in the workflow layout. You can ensure that it is present by basing the Advanced List, On-demand Campaign, or Corporate Campaign on a template that uses milestones or by editing the workflow layout.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign, then open the Workflow tab.
2. If necessary, change the layout of the spreadsheet view to show the **Milestone Type** column.
3. Click **Edit** to make the workflow spreadsheet editable.
4. In the **Milestone Type** column, in the task row for which you want to set a milestone, select a milestone from the drop-down list.
5. Click **Save** or **Save and Finish** to save the milestone you set.

The milestone is now in effect for the Advanced List, On-demand Campaign, or Corporate Campaign.

Schedules

There are two options for scheduling in workflows: baseline and up-to-date.

Baseline scheduling

You use baseline scheduling when you want to compare actual dates to fixed target dates. With baseline scheduling, you never change the target dates, allowing them to serve as a baseline. Users who are assigned tasks receive reminders on completing the actual/forecast dates.

While you work with a baseline schedule, the owner of the Advanced List, On-demand Campaign, or Corporate Campaign sets the initial Target Start and End dates for each task. These dates stay fixed throughout the entire workflow. As the List, On-demand Campaign, or Corporate Campaign progresses, the owner can update the actual/forecast dates with real data based on status information received from team members.

Up-to-date scheduling

You use up-to-date scheduling when you want to use actual dates to update the official schedule (defined by the Target Start and End dates) regularly. This mode enables project managers to capture the most up-to-date, official schedule; however, it does not provide an easy way of viewing a baseline version of the schedule.

Using a baseline schedule

System administrators set up permissions and reminders for baseline schedules. Schedule owners set the dates for each task in the baseline schedule. Team members update the progress for their tasks in the baseline schedule.

Before you create your projectsLists, On-demand Campaigns, or Corporate Campaigns, have the system administrator set up the following permissions and reminders:

- Set permissions so that only projectList, On-demand Campaign, or Corporate Campaign owners can update **Target** dates.
- Set reminders (alerts) that are based on the **Actual/ForecastActual** dates.

While you work with a baseline schedule, team members perform the following high-level steps.

1. The owner sets the **Target Start** and **End** dates for each task.

   These dates stay fixed throughout the entire projectList, On-demand Campaign, or Corporate Campaign.

2. As the projectList, On-demand Campaign, or Corporate Campaign progresses, team members update the **Actual/ForecastActual** dates with real data.

Keeping an up-to-date schedule

System administrators set up permissions and reminders for schedules. Schedule owners set the dates for each task in the schedule. Team members update the progress for their tasks.

Before you create your projectsLists, On-demand Campaigns, or Corporate Campaigns, have your system administrator set up permissions and reminders as follows.

- Set permissions so that only projectList, On-demand Campaign, or Corporate Campaign owners can update **Target** dates.

- Set reminders (Alerts) that are based on the **Target** dates.
- Set reminders to be sent only to the owner or owners.
- Optionally, set reminders on the **Actual/ForecastActual** dates to be sent to team members.

While you work with an up-to-date schedule, team members perform the following high-level steps.

1. The owner sets the initial **Target Start** and **End** dates for each task.
2. As the projectList or On-demand Campaign progresses, team members update the **Actual/ForecastActual** dates with real data.
3. If a task is delayed (the owner receives reminders that are based on **Target** dates), the owner assesses the situation and adjusts the **Target** dates and durations as necessary.

Date dependency calculations

When you enter or change the date for a task, the system calculates other dates that are based on your entry. It uses an internal algorithm to bidirectionally calculate the dates of dependencies, starting with the cell where you entered the date.

When you initiate date dependency calculations for a workflow, note the following issues:

- In addition to factoring in non-work days and hours, date dependency calculations use two additional system-wide properties: start time of day and number of hours per day. Your system administrator configures these settings.
- If a task row is anchored, the date dependency calculation does not update its dates (even if the date columns are empty).
- Date dependency calculations do not affect active and finished tasks; only tasks with a status of Pending.
- Date dependency calculations observe the per-task options for non-work time. The calculation algorithm takes into account whether a task is scheduled to progress during non-work time, weekends, or both.

- Do not log forecasttarget times outside of business hours if you intend to do date dependency or other automatic calculations afterward. That information is overwritten by the automated process.

Calculating workflow dates automatically

When you enter or change the date of a task, the system calculates other dates that are based on your entry.

To calculate workflow dates automatically, complete the following steps.

1. Enter or change the date for a task in any of the date fields.

2. Select the date and click anywhere on the screen except for another date field.

   The **Date Dependency Calculation** icon ( ) is displayed next to the end date.

3. Click the **Date Dependency Calculation** icon.

   Alternatively, you can select one of the toolbar icons for recalculating dependency dates.

The other dates in the workflow are updated, because of the new entry.

Calculating date dependencies above a locked task

If a workflow has a locked task, and you change the date of a task that is located above that task, you receive a warning when you calculate date dependencies.

To clarify this task, the procedure that follows assumes:

- Task 1.8 is locked.
- You need to change the duration of task 1.5 from five days to 10 days.
- All tasks depend on the previous task.

1. Open the workflow for editing, and change the duration on task 1.5 from five days to 10 days.

2. Click the **Date Dependency Calculation** icon ( ) next to the end date of task 1.5.

   The system displays a warning message, saying you cannot recalculate through the locked row.

3. Click the start date of task 1.8

4. Click the **Date Dependency Calculation** icon.

The system calculates the dates below the locked task.

Design for multiple drops, lots, waves, and offers

With Collaborate, you can design Corporate Campaigns, On-demand Campaigns, and Lists that fulfill a number of business needs.

Multi-drop design

Multi-drop Corporate Campaigns, On-demand Campaigns, or Lists are recurring campaigns or lists that run at specified intervals (each month, for example) over a defined time.

Multi-drop campaigns and lists use a workflow or a workflow stage that is configured to repeat at specified intervals. Each drop, or stage, in the workflow is made up of the tasks necessary to fulfill one complete drop, or stage, of the campaign.

When to use a multi-drop design

Organizations use multi-drop campaigns or lists to manage campaigns that span time and require multiple contact points, usually at regular intervals. Examples of multi-drop campaigns are:

- Newsletter campaign: You might create a multi-drop Corporate or On-demand Campaign to manage distribution of newsletters at regular intervals on an ongoing basis.
- Birthday campaign: You might create a multi-drop Corporate or On-demand Campaign to manage a campaign where some offer and greeting are sent to contacts during the months of their birthdays.

Set up multi-drop Corporate Campaigns, On-demand Campaigns, and Lists

Multi-drop Corporate Campaigns, On-demand Campaigns, and Lists use recurring templates. In the multi-drop template, you must:

- Define the stage of your workflow that contains the tasks you want to recur (only one stage can be recurring)
- Define properties for recurrence by using the Recurrence tab

Multi-drop design is applied when you create a Corporate Campaign, On-demand Campaign, or List by using the recurring templates that you established.

Multi-lot design

Multi-lot Corporate Campaign and On-demand Campaigns are campaigns that distribute the effort of customer contact over time when you deal with a large list of targeted customers.

When to use a multi-lot design

Organizations use multi-lot features to manage customer lists that are too large to handle at one time. A multi-lot design allows Field Marketers to accept a subset of a list for contact in one "lot." Field Marketers can then accept more contacts for contact at subsequent lots, distributing the effort over time.

Set up multi-lot Corporate Campaigns and On-demand Campaigns

To achieve a multi-lot design, your Corporate Campaigns or On-demand Campaigns must use flowcharts in Campaign that are designed specifically for each lot. You can use a single flowchart for all lots or a separate flowchart for each lot. In either case:

- The list generation task for the initial lot selects from your Campaign database to create the first list for Field Marketer review.
- The list generation task for the second lot targets those contacts that were left in the Waiting state after the first list review, as well as any new contacts included from the latest list generation.

Multi-wave design

A multi-wave design for Corporate Campaigns and On-demand Campaigns allows you to distribute offers through several waves of contact. Multi-wave Corporate Campaigns and On-demand Campaigns are typically nonrecurring campaigns, with workflows made up of different stages, or waves.

Multi-wave campaigns take advantage of Campaign response tracking. You can design a "second wave" of offers to be sent to contacts who did not respond to the initial offer.

When to use a multi-wave design

Use a multi-wave design when you want to manage campaigns that present a series of offers to customers. For example, an organization may want to create a multi-wave Corporate Campaign to:

1. Send an offer to a list of contacts.
2. Send a second offer to contacts who did not respond to the initial offer.

   For example, Field Marketers may use the same flowchart each month to identify prospects who have birthdays in the current month. In this case, the first wave of the campaign must complete, so that you can identify the non-responders. After this wave is complete, the second wave of the campaign can be used to distribute the second offers to the non-responders.

Understanding multi-wave Corporate Campaigns and On-demand Campaigns

To achieve a multi-wave design, your Corporate Campaigns and On-demand Campaigns must use flowcharts in Campaign that are designed to accommodate each wave of contact.

You can use a single flowchart for all waves, or create a separate flowchart for each individual wave. In either case:

- The list generation task for the initial wave selects from your Campaign database and creates the first list for Field Marketer review.
- The list generation task for all subsequent waves should select from only those contacts that are generated by the previous wave as input. For example, if you want to send an offer to contacts who did not respond to the first wave, the flowchart that is used for the second wave filters out the responders and select the non-responders from the first wave.

Multi-offer design

You use a multi-offer design for Corporate Campaigns, On-demand Campaigns, and Lists to create a campaign or List that sends different offers to different customers.

Multi-offer Corporate Campaigns, On-demand Campaigns, or Lists can be nonrecurring or recurring. These campaigns take advantage of the segmenting capabilities in Campaign to target different contact segments with different offers.

When to use a multi-offer Corporate Campaign, On-demand Campaign, or List

Organizations use multi-offer design to manage campaigns and Lists that target different segments of the customer population. Examples of multi-offer design include:

- Offers for responders and non-responders: You might create a multi-offer campaign to provide one offer to those who respond to a campaign, and another separate offer to those who do not respond.
- Offers for different audiences: You might create a multi-offer campaign to manage different offers for different audiences. For instance, a financial institution might send one offer to college students and another offer to individuals who are head-of-household.

Creating a multi-offer On-demand Campaign or List

Field marketers can create multi-offer On-demand Campaigns and Lists by selecting a template in which a corporate marketer or administrator already set up the necessary segments, flowcharts, and workflows.

The instructions below describe the steps to take before the field marketer creates the On-demand Campaign or List to be performed by others that are working with Campaign and Collaborate templates.

1. Create flowcharts and forms for your On-demand Campaign or List.

    Ensure the following:

    • The flowcharts create different segments.
    • The Segment Codes are written to the List Manager table.

2. Create an On-demand Campaign or List template and add forms as a custom tab.

3. Modify the workflow.

    For each List Review system task:

    a. Click the task name.

        The task properties window is displayed.

    b. Complete the task properties window as desired.

        In the **Segment Code** field, enter the appropriate segment name as it is displayed in the flowchart that is used to create your forms/tabs.

4. Create an On-demand Campaign or List by using the template.

5. Start the On-demand Campaign or List.

Workflow task status

Each new workflow task has a status of Pending. As project managers and participants work on tasks, they update the status to indicate the current progress.

You can change the status of a task when you are working in spreadsheet view mode or timeline view mode by clicking the task name. For more information, see Post Task Update dialog (on page 99). You can also change the status of a task when you are in edit mode: Click the **Status** column of the task, then choose the appropriate status from the drop-down list.

Table 5. Task status

Status	Description
Pending	Indicates that a task is not yet in progress. When you create a task, it defaults to the pending state. The pending state is symbolized by a blank status field.
Active	Indicates that a task is in progress. Symbolized by the ⧖ icon. You can also type A to place a task in the active state
Skipped	Indicates that a task was skipped. Symbolized by the ↻ icon. Skipped tasks are tasks for which members no longer do work. Any dependencies of this task are also disregarded. You can also type S to place a task in the skipped state.
Finished	Indicates that a task is complete. Symbolized by the ⊘ ☑ icon. You can also type F to place a task in the finished state.

Note the following relationships between the task status and the **% Complete** for a task.

- If you enter 100 as the **% Complete** for a task, the status is updated to Finished.
- If you enter 0 as the **% Complete** for a task (if it was previously finished), the status is updated to Pending.

- If you enter any number from 1 to 99 as the **% Complete** for a task (if it was previously finished), the status is updated to Active.
- If you mark the status for a task as **Skipped**, all of the dates for the task are cleared. Until you click **Save** (or **Save and Finish**), you can retrieve the dates by canceling the editing session. However, after you save the spreadsheet with the dates cleared you cannot retrieve them.

Completing multiple tasks

If you are assigned tasks for one or more projectsAdvanced Lists, On-demand Campaigns, or Corporate Campaigns, you can set them to complete at the same time.

To complete multiple tasks at one time, complete the following steps.

1. Open the **Tasks** list page to view all of your assigned tasks.
2. Select the check box for each task you want to complete.
3. Click **Complete Selected**.
4. In the **Complete Selected Tasks** dialog box, select one of the following options:

Option	Description
Leave all dates as they are	The tasks are marked as complete, but no end dates are modified.
Set all actual end dates to now	Each selected task is marked complete, and its actual end date field is set to the current date and time.

5. Click **Continue** to complete the selected task or tasks or **Cancel** to return to the list page without saving your changes.

Any tasks that you selected are removed from the **Tasks** list page and their status is changed to complete. Additionally, their end dates are set, if you selected that option.

Skipping multiple tasks

You can skip tasks when you are assigned tasks for one or more projectsAdvanced Lists, Corporate Campaigns, or On-demand Campaigns.

1. Open the **Tasks** list page to view all of your assigned tasks.
2. Select the check box for each task to skip.
3. Click **Skip Selected**.
4. In the confirmation dialog box, click **OK** to skip the selected tasks, or **Cancel**.

Any tasks that you selected and skipped are removed from the **Tasks** list page, and their status is changed to Skipped.

Workflow copy and paste

For efficiency, you can copy and paste most kinds of tasks in the workflow.

When you are copying and pasting tasks, note the following behavior.

- To copy, you must select a continuous range of cells by using Shift+click. You cannot select multiple, disconnected tasks by using Ctrl+click.
- To select a single cell, you must use Shift+click.
- If you do not insert enough blank tasks to correspond to the ones you are copying, existing task values are overwritten.
- To paste rows at the insertion point, you can click **Paste** from the **Tools** menu or press Ctrl+V. To paste rows after the selected row, you must click **Paste Rows After** from the **Tools** menu.

Copying data in Internet Explorer

You can copy data from a continuous group of cells to another place in the same workflow, or into the workflow for another Advanced List, On-demand Campaign, or Corporate Campaign.

1. Open the Advanced List, On-demand Campaign, or Corporate Campaign that has the tasks to copy and click the **Workflow** tab.

2. Click **Edit**.

3. Shift+click to select the first source cell. If this value is the only one that you are copying, skip to step 5.

4. Point to the final source cell, then press Shift+click over this cell.
   A range of cells you selected is highlighted.

5. From the workflow toolbar**Tools** menu, select **Copy** to copy the selected task or tasks.

   If you are pasting the tasks into the same workflow, skip to step 7.

6. If you are copying the tasks to another project workflow, go to the destination Workflow tab, and open it for editing.

7. **Optional:** Insert enough blank rows below the destination to act as placeholders for the task values you are copying.

   For example, if you copied data from six tasks, make sure that there are six consecutive task rows available. If you do not create the necessary rows, existing values for tasks below the insertion point are overwritten.

8. Shift+click the destination cells.

9. From the workflow toolbar, select **Paste** from the **Tools** menu item to paste the values.

The source data is placed in the workflow, starting from the selected destination task.

Post Task Update dialog

To provide a quick update for a workflow task when the **Workflow** tab is in spreadsheet view mode or timeline view mode, click the task name. The **Post Task Update** dialog opens. Use this dialog as a quick alternative to editing the entire workflow, when you need to update a

single task only. From this dialog, you can update a subset of task values, add attachments, and add comments.

The **Post Task Update** dialog box contains the **Status** and **Attachments** tabs.

Task status tab

The **Status** tab contains the following fields.

Table 6. Fields on the Status tab

Field	Description
Owners	Display only. The task owner or owners. At the task level, Advanced List, On-demand Campaign, or Corporate Campaign members are identified as task owners. To change the task owners, you use workflow spreadsheet edit mode. In the **Members** column, add people to a task.
Target DatesActual Dates	Display only. Calculated start and end dates and duration for the task. To update these values, change the values in the date and time fields.
Status	The status of the task. Select a value from the supplied list.
Enable attachments	Project owners and the administrators who design workflow templates can indicate whether members can add attachments for the task.
% Complete	Progress for the task. Enter a whole number 0 - 100. 📒 **Note:** To change the state of a task marked as finished back to active, you must change the status to **Pending** and the **% Complete** to a number less than 100. If you do not change both values, the task remains marked as completed after you save.
Actual Effort	The time that is spent on the task. Click the field to enter a value in days, hours, and minutes, for example, `03D-02H-00M`.

Field	Description
Forecast / ActualTarget date and time	The begin and end dates and times for the task.

Collaborate calculates these dates for your task based on the status if you do not enter a start date, end date, or both

When you start a task (change the status from **Pending** or empty to **Active**), and save:

- If the start and end date are empty, then the start date is set to the current date and time. The end date is set to the current date time plus duration.
- If the start date is set, but the end date is not set, the end date is set to the start date plus duration.
- If the end date is set, but the start date is not set, the start date is set to the end date minus duration.

When you complete a task (change status from **Pending** or empty to **Finish**), and save:

- If the start and end date are empty, then the end date is set to current date and time. The start date is set to the end date minus duration.
- If the start date is set, but the end date is not set:
    ◦ If the start date is set prior to the current date, then the end date is set to the current date and the duration is set to the end date minus the start date.
    ◦ If the start date is set later than the current date, then the end date is set to the current date and the start date is set to the end date minus duration.
- If the end date is set, but the start date is not set, the start date is set to the end date minus duration.

When you change a task to pending, and save:

Field	Description
	• If the start and end dates are empty, those dates are kept empty. • If the start date is set but the end date is not set, then the end date is set to the current time plus duration. • If the end date is set but the start date is not set, then the start date is set to the end date minus duration.
Comments for revision history	Enter notes to include in the revision history of the project and in any notifications that are sent about the task.
Workflow Notes	Enter notes to display with the task in spreadsheet view or edit mode.

Task attachments tab

The **Attachments** tab contains the following fields.

📝 **Note:** Only the owner of a task can add an attachment. You can identify member roles and members for tasks in edit mode.

Table 7. Fields on the Attachments tab

Item	Description
Attachments	The top of the page lists current task attachments. The following information displays for each attachment: • The attachment name, which is a link to the attachment. • The file type and size. • A description, including the date and time the attachment was added, the name of the person who added it, and any additional comments. • Links for removing attachments or for sending the attachment by email.
File to Attach	Select the source of the file to attach.

Item	Description
Browse	Click to browse your computer for the file to attach. Supported file formats include DOC, PPT, XLS, PDF, GIF, JPEG, PNG, and MPP.
Comments	Enter text to describe the attachment.
Save Attachment	Click to attach the selected file or URL.

Spreadsheet view mode

When you display the **Workflow** tab in spreadsheet view (the default), information about the stages and tasks in your workflow display in tabular format.

For information about the columns that display, see Workflow spreadsheet columns (on page 106).

In addition to viewing data for the workflow, you can update task status and scheduling information and add attachments. For more information, see Post Task Update dialog (on page 99).

To customize the spreadsheet view, click **Layout** (👁) on the Workflow tab. You can select the columns to display and the width of the first (task name) column. For more information, see Spreadsheet or timeline view customization (on page 104).

Timeline view mode

When you view the workflow on a timeline, you can update the task status and scheduling information and add attachments.

The Workflow tab timeline view presents a view of the tasks for a projectList, On-demand Campaign, or Corporate Campaign over a period of weeks or months. To display tasks

on a timeline, click **View > View as a Timeline/Gantt chart Timeline View** ▦ . To replace, naviagte to **Spreadsheet view** or **Weekly timeline**.

For more information, see Post Task Update dialog (on page 99).

To customize the timeline view, click **Layout** (👁) on the **Workflow** tab. You can customize the timeline view in any of the following ways:

- Choose weeks or months as the time scale.
- Select the dates to plot: Actual/Forecast or Target.
- Select captions for timeline bars.

For more information, see .

Spreadsheet or timeline view customization

When you view the **Workflow** tab in spreadsheet view mode or timeline view mode, you can make choices about the information that you want to see.

To customize the view, click **Layout** (▥ 👁).

Options on the Project Workflow Tab Layout dialog

The **Project Workflow Tab Layout** dialog displays the following options:

Table 8. Options on the Project Workflow Tab Layout dialog

Option	Description
Spreadsheet Layout	To hide the options in the Spreadsheet Layout section on this dialog, click the icon next to the section title. To view a hidden section, click again.
Columns to Display	A list of check boxes that corresponds to the columns you can include in spreadsheet view mode. Click a link above the list to select a preset group of columns to display: - **all**: default setting; all boxes checked (all columns display). - **targets**: hides Status, % Complete, and Actual date columns. - **actuals**: hides Target Dates/Effort and Member/Reviewer roles columns.

Option	Description
	• **all dates**: displays all columns that are related to target and actual dates. • **responsibility**: displays columns that are related to who is assigned to complete the tasks. Alternatively, you can check individual columns to include them or clear columns to remove them.
First Column Width	Defines the width for the first column, which displays task names and dependencies. You can set a different first column width for spreadsheet view mode and for timeline view mode. Select: • **Remember Last Setting**: When you view the workflow spreadsheet, you can adjust the first column width to see more or less of the task names. • **Exactly**: Select to enter a number that sets the column to an exact width in pixels.
Timeline Layout	To hide the options in the **Timeline Layout** section, click the icon next to the section title. To view a hidden section, click again.
Time Scale	The increment of time that is used for measurement. Select **Weeks** or **Months**. The default setting is Weeks.
Bars Represent	The bars in the timeline view indicate durations. You can choose to display Actual/Forecast dates, Target dates, or both. The default is to display both.
Bar Captions	By default, the bars do not have captions. Select an option to display task information as bar captions. For example, you can have task names or milestone types display as the captions.
First Column Width	Defines the width for the first column, which displays task names and dependencies. You can set a different first column width for spreadsheet view mode and for timeline view mode. Select:

Option	Description
	• **Remember Last Setting**: When you view the workflow spreadsheet, you can adjust the first column width to see more or less of the task names. • **Exactly**: Select to enter a number that sets the column to an exact width in pixels.
Make these the default settings for this project workflow tab	Check this box to make your selections the default for the **Workflow** tab. This option ensures that your display settings for this tab do not change until you make another change and check this box. 📝 **Note:** Your settings become the defaults for all users for this workflow, until someone changes the defaults.
Use these settings for current workflow only	Check this box to apply your selections to the current workflow only. This option ensures that your display settings for this workflow do not change until you make another change and check this box. Clear this box to make your selections the default for the **Workflow** tab. Your settings become the defaults for all users for this workflow until someone changes the defaults.

Workflow spreadsheet columns

When the workflow displays in spreadsheet view mode (the default view) or in edit mode, data is presented in a spreadsheet of columns and rows. You review and enter information in the spreadsheet cells for each column.

Table 9. Workflow spreadsheet columns

Column	Description
Tasks, Stages	Lists the tasks and stages that make up the Advanced List, On-demand Campaign, or Corporate Campaignproject. When in edit mode, click a stage or task to revise or change its sequence, name, or dependencies.

Column	Description
	When in view mode, click a task to update status and scheduling information. For more information, see Post Task Update dialog (on page 99).
Status	Displays an icon to indicate the status of the task. Tasks can have one of the following statuses. • Pending • Active • Skipped • Finished
% Complete	The percentage value that represents how complete a task is. In edit mode, click the measuring bar for a task and enter a new % Complete number. The measuring bar expands to display a comparable level.
Forecast/Actual Start	For tasks in the pending state, this field represents the Forecast Start date. Forecast Start dates display in italic font. After you change a task from Pending to Active, this field represents the Actual Start date. Actual Start dates are in regular font. In edit mode, click in the cell to use a calendar to select a date and time.
Forecast/Actual End	For tasks in the pending state, this field represents the Forecast End date. Forecast End dates display in italic font. After you change a task from Active to Finished, this field represents the Actual End date. Actual End dates are in regular font. In edit mode, click in the cell to use a calendar to select a date and time.
Forecast/Actual Duration	The duration of the task, in days, hours, and minutes.

Column	Description
	If you enter both start and end dates, the system automatically calculates a value for this field (the Forecast/Actual End date minus the Forecast/Actual Start date).
Actual Effort	The actual effort that it took to complete the task, as opposed to calendar duration. Effort is measured in days, hours, and minutes.
Anchored Dates	Indicates whether the task is anchored. If a lock icon displays, the dates for the task are anchored.
	To specify anchored dates for a task, click the column, then select **Anchored** from the menu. The task date cannot move even if the dates of the tasks it depends on change.
	If a dependency is not met, the dates in conflict appear with a different icon and in a different font.
	For example, suppose task 2.2 depends on task 2.1. If the target end date of task 2.1 is after the target start date of task 2.2, both the target end date of 2.1 and the target start date of 2.2 appear in red. This action occurs only if you anchored the date for task 2.2 by selecting the lock icon in the **Anchored Dates** column.
Schedule Through	Indicators for which dates to use when you determine task dates. The following options are available.
	• **Bus. - Business days only**: include only standard, non-holiday, non-weekend dates in date calculations that are made for this task. This schedule is the default for all tasks.
	• **Wkd. - Business days + Weekends**: include weekends in date calculations that are made for this task.
	• **Off. - Business days + Days off**: include predefined system-wide non-work time in date calculations that are made for this task.

Column	Description
	• **All - All calendar days**: include all dates in date calculations that are made for this task. No dates are ignored when dates are calculated for this task.
Target Start	The targeted start date of the task. In edit mode, use the calendar to select a date.
	You can add a custom milestone type to set a target and forecast dates for all tasks in a workflow in a project template. To do this, create a milestone with code START. Then, create a project template. In the workflow of this template, assign one task with this milestone type. When you create and save a project with a target start date that uses this template, the task with the new milestone type copies the project start date as its own target start date as well as its forecast start date. These target and forecast dates are then rippled to all dependent tasks in the project.
	The milestone type START can only be assigned to one task in a workflow.
Target End	The targeted end date of the task. In edit mode, use the calendar to select a date.
Target Duration	The duration of the task, in days, hours, and minutes. The Target End minus the Target Start dates.
Target Effort	The targeted effort that is estimated to complete the task, as opposed to calendar duration.
Milestone Type	A task milestone that you choose from a list. Example options might be Meeting, Event, and Job Start. System administrators set the milestone types that are on the list.
	For more information about setting up milestones, see the Collaborate Installation Guide and Collaborate Administrator's Guide.

Column	Description
Member Roles	A role or roles that are associated with the task. These roles can be loaded automatically from the project template that is used to create the project, or the project owner can set them up manually.
Members	The people that are associated with the task. If a workflow task has a role in its **Member Role(s)** column, when you assign people to roles, the workflow automatically adds a person in the corresponding **Members** column. You can also add people to the Members column manually while you edit the workflow.
Enforce Dep.	If this task depends on other tasks, determines how strictly the system interprets dependencies. When this option is selected, the system restricts project members from updating this task until the tasks it depends on are finished.
Required	Indicates whether this task is required. Required tasks cannot be skipped or deleted and their names cannot be changed.
Task Code	A read-only code that identifies each task uniquely within a project. System integrators use this code to implement custom business logic for tasks.
Notes	Any comments about the task.

Edit mode toolbar

When you switch from a view mode to edit mode, you can change the workflow. You click the icons on the toolbar to add, move, and delete stages and tasks.

The following table describes the toolbar options.

Table 10. The edit toolbar for the Workflow tab

Icon	Description
⊕	**Add Row**. To add a row after an existing row in the workflow, select the row then click this icon to specify the type of row. You can add: • Stage: stages organize tasks into groups • User Task • Flowchart Run • List Review • Notify Field Marketers (Corporate Campaigns) • Subscription (Corporate Campaigns) • Recurrence Collaborate adds the task and renumbers the subsequent tasks.
⊞	**In Series**. By default, the system adds rows to the spreadsheet in series, so each task depends on the task that precedes it. To use a different dependency option, click this icon and make a selection before you add the next task to the workflow. Select a dependency option. • No Dependencies: when you add a row, the system does not make it dependent on any other row • In Series: when you add a row, the system makes it dependent on the row above it • In Parallel: when you add a row, the system makes it dependent on the same task or tasks as the row above it Each row that you add uses the same dependency option until you change your selection.

Icon	Description
	You can also change dependencies manually; click the task or stage name and supply a comma-separated list of numbers in parentheses. For more information, see [Task dependencies (on page 80)](#).
⊕	**Add Stage Row**. Adds a stage in the spreadsheet. Tasks are grouped in stages.
	Move row up. Click a task or stage name to select the row, then click this icon to move the selected row upward. 📝 **Note:** • When you move a row, its task dependencies do not change. • When you move a stage, all of its associated tasks move with it.
	Move row down. Click a task or stage name to select it, then click this icon to move the selected row downward. 📝 **Note:** • When you move a row, its task dependencies do not change. • When you move a stage, all of its associated tasks move with it.
	Delete row. Click a task or stage name to select it, then click this icon to delete the component. 📝 **Note:** • You cannot delete the first stage in a workflow spreadsheet. • When you delete a stage, its associated tasks are appended to the previous stage. The tasks are not deleted.
	Recalculate Dates. Shift+click to select one or more adjacent cells in the spreadsheet, then click this icon to apply one of the following options:

Icon	Description
	• Preserving slack time between Tasks: recalculates all date dependencies that are based on your changes; any slack time between dependent tasks is not removed. • Removing slack time between Tasks: recalculates all date dependencies that are based on your changes; any slack time between dependent tasks is removed.
🔧	**Tools**. Offers options that affect the values in specific spreadsheet cells, or that affect a column or the entire spreadsheet. To apply any of the following options, you must first Shift+click to select one or more adjacent cells in the spreadsheet: • Copy: copies the contents of the selected cells to the clipboard. • Paste: pastes the contents of the clipboard, beginning at the selected cell. • Paste Rows After: pastes the contents of the clipboard below the selected row. • Mark as: changes the Status and % Complete values for the corresponding task or tasks. For example, Mark as Finished changes the Status to Finished and % Complete to 100%. You can mark tasks as Skipped, Finished, Active, or Pending. • Fill Down/Up: copies the value in the selected cell or group of cells to the cells below or above it. • Clear: erases all entries in the selected cell or group of cells. 📝 **Note:** You must apply these options to cells that are adjacent; that is, Ctrl+click selections are not supported. The other options on the **Tools** menu function as follows:

Icon	Description
	• Import and save workflow: available if the project is in Not Started status only. Replaces the entire spreadsheet with the tasks and values in a previously defined workflow template. • Clear Column: click a single cell, then select this option to erase all entries in that column. For columns that have a default value, such as Schedule Through, every cell is set to the default. • Clear All: erases the entire spreadsheet.
	Click to recalculate dependent dates while preserving slack time. Recalculates all date dependencies that are based on your changes; leaves any existing slack time between dependent tasks. Click to recalculate dependent dates while removing slack time. Recalculates all date dependencies that are based on your changes; removes any slack time between dependent tasks.
	Undo. Click to undo your last change.
	Redo. Click to reapply a change you undid with the Undo action.
	Save. Click this icon to select one of the following options: • Save: Interim save, the spreadsheet remains in edit mode. • Save and Finish: Saves your work and displays spreadsheet view mode. • Save and Return to List: Saves your work and displays the most recently selected list of projects.
	Cancel. Return to spreadsheet view mode without saving edits that are made since your last save.

Click one of the following options to complete your work:

• **Cancel**. Return to spreadsheet view mode without saving edits that are made since your last save.

- **Save**: Interim save, the spreadsheet remains in edit mode.
- **Save and Finish**: Saves your work and displays spreadsheet view mode.

Work in spreadsheet view mode

When you initially click the Workflow tab, it displays in spreadsheet view mode and offers the following user interface controls.

Table 11. Controls on the Workflow tab

Control	Description
Breadcrumb links	Breadcrumbs (links to the pages you visited before you arrive at the current page) are located above the projectList, On-demand Campaign, or Corporate Campaign name. Click any active link in the breadcrumb trail to go to that page.
🖊	**Edit**. Changes the display to edit mode so that you can add, remove, and change workflow stages and tasks and enter detailed information for the tasks. For more information, see Edit mode toolbar *(on page 110)*.
⬆	**Save as Template**. Saves the workflow definition as a reusable workflow template (if you have the permission to do so). A dialog opens for you to name the template. For more information about using template components, see the Collaborate Administrator's Guide.
▦	**Spreadsheet View**. Changes the display to spreadsheet view mode, which provides information about each task in tabular format. When you view the workflow as a spreadsheet, each task name is a link. Click a task to open a dialog where you can add and change information about the task. For more information, see Post Task Update dialog (on page 99).

Control	Description
	Weekly Timeline View. Changes the mode to present a graphic display of scheduling information for the tasks, including duration and status. For more information, see Timeline view mode (on page 103). When you view the workflow on a timeline, each task name is a link. Click a task to open a dialog where you can add and change information about the task. For more information, see Post Task Update dialog (on page 99).
👁	**Layout**. Opens a dialog where you can select the columns that you want to display in spreadsheet view mode, and choose the time scale and dates to include in timeline view mode. For more information, see Spreadsheet or timeline view customization *(on page 104)*.

Changing the layout of the workflow

You can change the layout of the spreadsheet and timeline views of the workflow to display the information that you need.

1. In the **Workflow tab**, click **Layout**.

   The Instance Workflow Tab Layout dialog box opens.

2. In the **Spreadsheet Layout** section, select the check boxes of all columns you want to show in the workflow.

   You can also use the links after **Columns to display:** to select subsets of available columns.

3. Set the first column width for the spreadsheet view.

4. In the **Timeline Layout** section, select values from the **Time Scale**, **Bars Represent**, and **Bar Captions** drop-down lists.

5. Set the first column width for the timeline view.

6. To have these settings apply only to the currently opened workflow, as opposed to all workflows you view, check **Use these settings for current workflow only**.

7. Click **Apply** or **Apply and Close** to save your selections.

The view of the workflow is updated to reflect your selections.

Setting the first column width

You can change the width of the first column in the workflow spreadsheet view and keep this setting for your entire session.

To set the first column width, complete the following steps.

1. Navigate to the **Workflow** tab of the projectAdvanced List, On-demand Campaign, or Corporate Campaign.
2. Use the column width control to resize the first column to your preferred width.
3. Click **Layout** in the upper right section of the screen.
4. In the **Instance Workflow Tab Layout** dialog, complete the following steps:
    a. In the **First Column Width** section, select **Remember Last Setting**.
    b. At the bottom of the dialog, check the **Make these the default settings for this project's workflow tab** box.
5. Click **Apply and Close** to save your changes and close the dialog.

The first column width is now set for this Advanced List, On-demand Campaign, or Corporate Campaign for the remainder of your session.

Chapter 8. Working with Lists, On-demand Campaigns, and Corporate Campaigns

This section contains common information about working with Lists, On-demand Campaigns, and Corporate Campaigns.

The content in this section applies to each of these objects, as the instructions are the same. For example, you delete a List, On-demand Campaign, or Corporate Campaign in the same way; therefore information about deleting these objects is presented together.

Where necessary, differences between Lists, On-demand Campaigns, and Corporate Campaigns are noted.

📒 **Note:** You may not have the necessary permissions to perform all tasks that are described in this section, or you may have permissions to perform the task on some objects, but not others. For example, field marketers can typically make changes to Lists and On-demand Campaigns, but can only view Corporate Campaigns. For more information, see your administrator.

Modifying the default contents of the Lists, On-demand Campaigns, and Corporate Campaigns pages

You can change which Lists, On-demand Campaigns, or Corporate Campaigns are displayed by default, as well as the columns included in the page.

When you select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns** from the **Local Marketing** menu, a page opens listing those objects.

1. While you are viewing the Lists, On-demand Campaigns, or Corporate Campaigns page, click the **Options** icon (⚙).

   The Options dialog box opens.

2. In the Default drop-down list, select the set of Lists, On-demand Campaigns, or
   Corporate Campaigns that you want shown by default when you open that page.

3. Determine which columns to show by selecting columns from the **Available Columns**
   list and **Selected Columns** list and by using the horizontal arrow keys to move columns
   between lists.

   Continue until the columns you want to display are all in the **Selected Columns** list.

4. Determine the order of columns by selecting columns in the **Selected Columns** list and
   by using the vertical arrow keys to move columns up and down.

   Continue until the columns are in the wanted order.

5. Click **Save Changes**.

The Lists, On-demand Campaigns, or Corporate Campaigns page changes to reflect your
selections. These changes remain in effect when you view the page later.

Modifying how Lists, On-demand Campaigns, and Corporate Campaigns are displayed

You can change how Lists, On-demand Campaigns, or Corporate Campaigns are displayed
in multiple ways.

When you select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns** from the
Navigation pane, a page opens listing those objects. The exact content depends on settings
that are defined by your administrator.

1. To change how objects are displayed, click the **View** icon ( ).

   The Set View Options dialog box opens.

   You can select:

   - **Timeline**, to show the objects in a table format.
   - **Text Calendar**, to show the objects as text entries in the calendar.

> • **Graphical Calendar**, to show the objects as graphics in the calendar.
>
> You also select the time period and color coding.
>
> To return to the table view, click the object name in the Navigation pane.

2. To sort the objects when you view as a table, click the name of the column to sort by. You can click the name again to switch between ascending and descending order.

The number of objects may be too high for a single screen. If there are multiple screens, you can click the screen number to view at the bottom of the table to see other objects. Additionally, you can click **Show All** to fit all objects in one screen.

Viewing specific Lists, On-demand Campaigns, or Corporate Campaigns

You can change which Lists, On-demand Campaigns, or Corporate Campaigns are displayed in multiple ways.

When you select **Lists**, **On-demand Campaigns**, or **Corporate Campaigns** from the **Local Marketing**, a page opens listing those objects. The exact content depends on settings that are defined by your administrator.

1. To view all objects, click **All ...** at the top of the page.

   All objects are displayed, as well as various filters for the display, for example, **Last Weeks ...**, **My ...**, and **Completed ....** You can click a filter name to see only objects that meet that criteria.

2. To view objects that meet certain criteria, click the **Filter** icon ( ).

   The Search for dialog box opens.

3. Complete the search criteria that you need, then click **Apply**.

Opening and editing a List, On-demand Campaign, or Corporate Campaign

You can open a List, On-demand Campaign, or Corporate Campaign from the **Dashboard** or from the page listing that object.

You must have the required permissions to open and edit a List, On-demand Campaign, or Corporate Campaign. For more information, see your administrator.

After you open a List, On-demand Campaign, or Corporate Campaign, you can edit any of its tabs.

1. Click the name of the List, On-demand Campaign, or Corporate Campaign.

   The Summary tab for that object opens.

2. Click the name of the tab you want to edit, or remain on the Summary tab to edit it.
   For example, if you edit the Workflow, you must open the Workflow tab before you click Edit.

3. Near the top of the page, next to the object's name, click the **Edit** icon ( ).

4. Edit the contents of the tab as necessary.

5. Click **Save Changes**.

Edits that you made to the tab are saved.

List, On-demand Campaign, and Corporate Campaign status

A List, On-demand Campaign, or Corporate Campaign each have a status.

The following states are:

- Not Started
- In Progress
- Paused
- Canceled
- Finished

Simple Lists begin in the In Progress state.

Advanced Lists, On-demand Campaigns, and Corporate Campaigns, whether recurring or not, begin in the Not Started state.

Changing the Lists, On-demand Campaigns, or Corporate Campaign status

The status of the List, On-demand Campaign, or Corporate Campaign is shown in the home page, the pages that list these objects, and in the **Summary** page.

To change the status, you must be viewing the List, On-demand Campaign, or Corporate Campaign Summary page.

1. View the **Summary** page for the List, On-demand Campaign, or Corporate Campaign.

2. Click the **Status** icon (⬜, 🔵, 🟢, or 🟡).

3. From the drop-down list, select the status to change to. Your options are Pause, Cancel, or Finish.

   A dialog box prompts you to add comments about the status change.

4. Add a comment and click **Continue** to close the dialog box.

The status of the List, On-demand Campaign, or Corporate Campaign changes to your selection.

Viewing and editing the **Summary** page

You can edit some, but not all, data on the **Summary** page for a List, On-demand Campaign, or Corporate Campaign.

By default, the **Summary** section for a List, On-demand Campaign, or Corporate Campaign is collapsed while in view mode. You can expand the section by clicking the header.

1. Open the List, On-demand Campaign, or Corporate Campaign to view the **Summary** page.

2. Click the **Edit** icon ( ).

   Certain fields in the **Summary** page become editable. For example, fields that you can typically edit are

   - Name
   - Description
   - Target Start Date
   - Target End Date
   - Other custom attributes that are created by your administrator

   Typically, you cannot edit campaign codes or List Review data.

3. Edit data as necessary.

4. Click **Save Changes**.

The **Edit Summary** page closes, and the changes you made are reflected in the **Summary** page.

Printing a List, On-demand Campaign, or Corporate Campaign

When you view a List, On-demand Campaign, or Corporate Campaign, you can print it on your local printer.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the **Print** icon ( ), and select **Print**.

   The Print dialog box opens.

3. Complete the Print dialog box as needed.

Exporting a List, On-demand Campaign, or Corporate Campaign

When you view a List, On-demand Campaign, or Corporate Campaign, you can export it to a Microsoft Excel file.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the **Print** icon ( ), and select **Export**.

   The File Download dialog box opens.

3. Click **Open** to open the Microsoft Excel file directly, or **Save** to save it to your computer.

   If you choose to save it, you are prompted for the location on your computer.

Copying a List, On-demand Campaign, or Corporate Campaign

When you view a List, On-demand Campaign, or Corporate Campaign, you can copy it to create one with the same settings.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the **Copy** icon ( ).

   You are prompted to confirm the copy.

3. Click **OK**.

   The **Summary** page for the new List, On-demand Campaign, or Corporate Campaign opens. The name of the new object is `Copy of existing object name`.

4. Edit information in the **Summary** page as needed.

5. Click **Save Changes**.

   The object closes.

6. To edit other pages in the List, On-demand Campaign, or Corporate Campaign, open, and edit the object.

Attachments

You can include attachments with a List, On-demand Campaign, or Corporate Campaign. These attachments provide information that is relevant to the campaign or List.

Corporate or field marketers might include the following as attachments, for example:

- Marketing messages for the initiative, including content for a mail campaign
- Data, such as customer names, generated after you run a List or On-demand Campaign

A List or On-demand Campaign owner or participant can include attachments only if the corporate template developers include the Attachments tab in the List or On-demand Campaign templates.

If the template developer includes attachments in the On-demand Campaign templates, field marketers or corporate marketers can use the attachments to help fulfill campaigns.

Corporate marketers can also add attachments to an On-demand Campaign when the Attachments tab is available through the On-demand Campaign template.

You can also include restricted attachments, such as `upload_allowedFileTypes` and `upload_fileMaxSize`. `upload_allowedFileTypes` indicates the types of files that can be uploaded in Collaborate, and `upload_fileMaxSize` indicates the limit on the maximum size of the file that can be uploaded.

Adding an attachment to a List, On-demand Campaign, or Corporate Campaign

If the template designer allowed it, when you view a List, On-demand Campaign, or Corporate Campaign, you can add a file as an attachment.

The file that you add can come from your computer or a URL.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Open the **Attachments** page.

3. Click the **Add Attachments** icon ( ).

4. In the **File to Attach** field, select **From My Computer** or **URL**.

5. In the field to the right, enter the path to the file.

   If you selected From My Computer, you can click **Browse** to visually find the file on your computer.

6. **Optional:** Add notes about the attachment.

7. Click **Save Changes**.

The file is attached to the List, On-demand Campaign, or Corporate Campaign.

Removing an attachment from a List, On-demand Campaign, or Corporate Campaign

You can delete an attachment from a List, On-demand Campaign, or Corporate Campaign by clicking the **Remove** button.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Open the **Attachments** page.

3. In the row for the attachment to remove, click **Remove**.

   You are prompted to confirm the deletion.

4. Click **OK**.

The file is no longer attached to the List, On-demand Campaign, or Corporate Campaign.

Posting a message

When you view a List, On-demand Campaign, or Corporate Campaign, you can post a message.

This message is associated with the List, On-demand Campaign, or Corporate Campaign only. You have the option of having these messages sent to other Collaborate users. You might need to post messages to convey to others that work on the List, On-demand Campaign, or Corporate Campaign about important information about the project.

📝 **Note:** These messages are separate from alerts. An alert is created when you create a message, but the alert does not contain the content of your message.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. While you view any page of the List, On-demand Campaign, or Corporate Campaign,

   click the **Communicate** icon ( ), then select **Post a Message**.

   The Messages dialog box opens.

3. Enter your message in the message field.

4. Select the delivery option.

5. Click **Post Message**.

The message is then associated with the List, On-demand Campaign, or Corporate Campaign. If indicated, it is also sent to users by email.

For those working with the List, On-demand Campaign, or Corporate Campaign, the number

next to the **Communicate** icon ( ), indicating that the new message is there.

Reading messages

Other Collaborate users might attach messages to a List, On-demand Campaign, or Corporate Campaign to pass on important information to other team members.

When you view the List, On-demand Campaign, or Corporate Campaign, you can view these messages. These messages might also be sent to you by email, if the other users chose this option.

1. Open the List, On-demand Campaign, or Corporate Campaign.

   The number of messages that are associated with the List, On-demand Campaign,

   or Corporate Campaign is indicated next to the **Communicate** icon ( ). In this example, there is one message to read.

2. Click , then select **Read Messages**.

The Messages dialog box opens, listing the messages that are associated with the List On-demand Campaign, or Corporate Campaign.

📝 **Note:** You can post a new message from this dialog box.

3. Click **Close** when finished.

Deleting Lists, On-demand Campaigns, or Corporate Campaigns

You must have the required permissions to delete a List, On-demand Campaign, or Corporate Campaign.

Typically, field marketers cannot delete Corporate Campaigns. For more information, see your administrator.

1. From the **Local Marketing** menu, click **Lists**, **On-demand Campaigns**, or **Corporate Campaigns**.

   The page listing that object type opens.

   📝 **Note:** To complete this task, you must view the objects in the Timeline view.

2. Check the field next to the name of one or more List, On-demand Campaign, or Corporate Campaign you want to delete.

   You can also check the field next to the Name column header at the top of the table to select all currently displayed objects.

   📝 **Note:** Checking this field selects only the objects that are currently displayed on screen. If the list of objects spans multiple pages, those objects on other pages are not selected.

3. Click the **Delete** icon (🗑).

   You are prompted to confirm the deletion.

4. Click **OK**.

The selected objects are deleted.

Deleting a List, On-demand Campaign, or Corporate Campaign

You must have the required permissions to delete a List, On-demand Campaign, or Corporate Campaign.

Typically, field marketers cannot delete Corporate Campaigns. For more information, see your administrator.

While you view a List, On-demand Campaign, or Corporate Campaign, you can delete it.

📒 **Note:** You can also delete multiple Lists, On-demand Campaigns, or Corporate Campaigns from the pages that list each of these objects.

1. Open the List, On-demand Campaign, or Corporate Campaign.

2. Click the **Delete** icon (🗑).

   You are prompted to confirm the deletion.

3. Click **OK** to delete the object.

The List, On-demand Campaign, or Corporate Campaign is deleted.

Chapter 9. Alerts

You can use alerts to communicate information to specific people about the state of an object or about an action that the user needs to take. Default alert subscriptions are set by administrators, but can be overridden on a per-object basis by owners and participants of the specific objects.

For workflow tasks, alerts are either brief or detailed.

Subscribing to alerts for an object

Users who are not administrators can override default settings within a plan, program, project, or project requestList, On-demand Campaign, or Corporate Campaign. By overriding the default, you can control the alerts that each object owner and participant receives.

If there are permissions that are configured for any of the tabs of a project or requestList, On-demand Campaign, or Corporate Campaign, the system filters the alerts. For example, alerts about attachments are not sent to users who do not have access to a project **Attachments** tab.

1. Open the object for which you want to change alert subscriptions.

2. Click the **Communicate** icon ( ) and select **Subscribe to Alerts**.

3. From the list of alerts, select the alert that you want to change. You can set or clear alert subscriptions for each type of user: **Owner** or **Participant**. The possible entries are as follows:

Option	Description
Check mark	The user receives the alert or alarm.
Blank	The user does not receive the alert or alarm.
n/a	You did not specify team membersusers for this access level (for example,

Option	Description
	Program Participant) when you created the object. After you add team membersusers with the corresponding access level, you can set alerts for that access level.

4. Click **Accept** to save your changes or **Cancel** to leave the alert settings as they were.

The **Alerts** page

When you receive an alert, go to the **Alerts** page to view it. Alerts are also sent to affected users' email addresses (for each user that has a valid email address that is set up).

For a detailed list of events that might trigger an alert and for more information about setting up alerts, see the Collaborate Administrator's Guide.

To view alerts, log in and click the **Alerts** icon (✉). Clicking, or scrolling, over the alerts icon shows a drop-down menu that separates the alerts for your installed applications. The number of alerts is displayed to the left of each application name. After you choose which application's alerts to view, the page displays the following information:

Table 12. Columns on the Alerts page

Column	Description
Page heading	The number of unread alerts, in parentheses, and the total number of alerts
Check box	Select alerts for a specific action, for example, to mark a group of alerts for deletion.
	Select the box in the first line, next to the Message Text label, to select all the alerts.
Message text	Text of the alert

Column	Description
Date/Time	The time of the event that triggered the alert

You can perform the following actions from the **Alerts**page:

Table 13. Controls on the Alerts page

Link/Button	Description
✉	Select the envelope icon next to an alert to mark the alert as read. After you click the icon, the alert is disabled. Reselect the icon to mark the alert as unread.
Alert title	Click the link in the alert to go to the object that is the subject of the alert. 📝 **Note:** The **Alerts** page remains open while you view the information in a separate window.
Pages	Click a page number to list the corresponding page of alerts.
Delete Selected	Click to delete the selected alerts.
Delete All	Click to delete all of your alerts.
Mark All as Read	Click to mark all your alerts as read, graying out each alert. A confirmation screen is displayed to ensure that you want to mark all alerts as read.
Mark All as Unread	If you have no unread alerts, click this link to mark all your alerts as unread.
Close	Click to close the **Alerts** page.